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# SUPPLY CHAIN MANAGER

## User's Manual



February 2006

This publication was produced for review by the United States Agency for International Development. It was prepared by the DELIVER project.



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# SUPPLY CHAIN MANAGER

## User's Manual

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

## **DELIVER**

DELIVER, a six-year worldwide technical assistance support contract, is funded by the U.S. Agency for International Development (USAID).

Implemented by John Snow, Inc. (JSI), (contract no. HRN-C-00-00-00010-00), and subcontractors (Manoff Group, Program for Appropriate Technology in Health [PATH], and Social Sectors Development Strategies, Inc.). DELIVER strengthens the supply chains of health and family planning programs in developing countries to ensure the availability of critical health products for customers. DELIVER also provides technical management of USAID's central contraceptive management information system.

### **Recommended Citation**

John Snow, Inc./DELIVER. 2006. *Supply Chain Manager User's Manual*. Arlington, Va.: John Snow, Inc./DELIVER, for the U.S. Agency for International Development.

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# Acronyms

AMC	average monthly consumption
ART	antiretroviral therapy
ARV	antiretroviral
CYP	couple-years of protection
DB	database
DRP	Distribution Resource Planning (module)
LMIS	logistics management information system
NTLP	National TB/Leprosy Program (Uganda)
SDP	service delivery point
TB	tuberculosis



# I. Introduction to Supply Chain Manager

## What Is Supply Chain Manager?

Supply Chain Manager is a software tool developed by John Snow, Inc. Written in Microsoft Access 2000®, Supply Chain Manager provides critical logistics information to managers of distribution systems. It monitors the flow of products from the central warehouse through intermediate warehouses to health service delivery points (SDPs) that distribute products to end users. Supply Chain Manager can help program managers determine which facilities are understocked or overstocked, review trends in consumption on a product-by-product basis, estimate procurement requirements for each product, identify facilities with potential inventory management problems, and plan deliveries to facilities.

Supply Chain Manager is not a system for warehouse management or procurement management, but it can work with existing management systems to ensure appropriate stock levels.

Supply Chain Manager has two modules: a logistics management module (Product Tracking) and a Distribution Resource Planning (DRP) module. The Product Tracking module helps monitor supply levels throughout the supply chain. The DRP module helps plan deliveries from a central distribution center to other facilities in the distribution system.

Supply Chain Manager also provides a means for transferring data entered into the system across multiple levels of the supply chain. Data from SDPs can be collected and entered at the district level through traditional paper-based systems. Those same data can then be electronically submitted to and synchronized with a central-level installation of Supply Chain Manager. Additionally, background information for products, facilities, and programs can be entered at the central level and electronically distributed to the lower-level facilities and stores.

## Product Tracking Module

The Product Tracking module helps managers monitor the flow of products from central warehouses to SDPs. This function facilitates replenishment of products up to the desired level at the end of each reporting period. Inventory can be monitored regularly at warehouses (for example, central, regional, or district warehouses) and at SDPs. The module helps logistics managers maintain appropriate stock levels throughout the supply chain, ensuring that products are available when they are needed (provided that stock levels are regularly reported and recorded).

The Product Tracking module is designed to assist logistics managers in carrying out the following activities:

- Monitoring the supply status of SDPs and warehouses
- Monitoring trends in product distribution that can help forecast future needs
- Making key logistics decisions on resupply, forecasting, and procurement
- Evaluating the performance of individual facilities and of the entire distribution system.

## Distribution Resource Planning Module

The DRP module helps managers allocate distribution resources—vehicles and personnel—for effective delivery of products to storage and delivery points within the distribution system.

The DRP module is designed to assist managers with the following functions:

- Monitoring facilities within the distribution system
- Defining the minimum shipment size of products to be distributed
- Defining the types of vehicles in the distribution fleet
- Tracking vehicles scheduled for delivery
- Defining delivery routes and tracking completed deliveries
- Allocating available personnel to delivery routes, thereby enabling efficient use of human resources
- Highlighting facilities requiring prompt delivery, thus helping avoid stockouts.

## What Is New in Version 3?

Version 3 of Supply Chain Manager is designed to support the features of today's integrated distribution systems. With version 3 you can

- Transfer electronic data across multiple levels of the supply chain (multi-tier reporting)
- Issue reports for groups
- Track tuberculosis and antiretroviral treatment programs.

## Minimum System Requirements

Supply Chain Manager requires the following minimum hardware and software resources:

Resource	Minimum Requirements
CPU	Pentium II class or higher
Operating System	Windows 95/98/2000/NT
Memory	32 MB
Hard Drive Space	100 MB
Video Adapter	VGA with 800 × 600 resolution
Printer	8 PPM laser

## 2. Before You Begin

### Distribution System Requirements

If you are to make the fullest use of Supply Chain Manager, your distribution system should have the following characteristics:

- Each facility receives products from one—and only one—supplying facility.
- All facilities report on the same schedule.
- Reports are submitted to one or more processing facilities, which can then electronically submit their data to a central-level processing facility for developing the big picture.
- Reporting is relatively complete, timely, and accurate.
- Facilities report beginning stock levels, receipts, issues, and adjustments for each product during each reporting period.

If you use an ordering system in which facilities at the upper end of your supply chain determine the amount of product to distribute (a push system), you may use the Distribution Resource Planning (DRP) module in addition to the Product Tracking module. In a push system, delivery vehicles distribute products from a distribution center to intermediate storage facilities and service delivery points (SDPs) on the basis of estimated need.

Your distribution system should have these characteristics to take advantage of the DRP module:

- Deliveries are made from one distribution center.
- Products are distributed only to facilities at the next level in the supply chain.

You can track stock levels at each facility in the Product Tracking module and plan deliveries to those facilities in the DRP module. Data on stock levels are entered into the Product Tracking module and are then used by the DRP module to determine which facilities are most in need of supplies, according to historical information.

### Before Using Supply Chain Manager

Before you can use Supply Chain Manager to track movement of products through the supply chain, you must describe your present distribution system. First, define your service delivery points and facility types, list the products you distribute, and list which products are supplied by each facility type. Then, describe your distribution system and establish the operating procedures you will use to enter and access data in Supply Chain Manager.

#### *Identify Service Delivery Points*

A service delivery point is a health service facility dispensing products to end users. Supply Chain Manager focuses on SDPs, viewing them as priority facilities for resupply. The software's primary role is to monitor the stock levels at SDPs. Supply Chain Manager also tracks logistics data for all

storage facilities in your distribution system to maintain the smooth flow of products from storage facilities to SDPs.

You must identify the facilities that will directly supply end users. Supply Chain Manager uses this information to determine whether to calculate the facility's average monthly consumption. These facilities must have a contact person and a unique facility code.

### ***Identify Facilities***

The facility list contains information about each facility in your supply chain. In addition to the facility code and contact person, the list should have the following information for each facility:

- Type of facility (for example, district warehouse or nongovernmental organization)
- Position of the facility within the supply chain
- Function of the facility (for example, warehouse, SDP, or both)
- Products authorized for use
- Minimum and maximum months of stock
- Contact information (name, address, phone, fax, email address).



SDPs and their associated storage facilities are jointly referred to as facilities in the inventory module's software and documentation.

### ***Assign Unique Facility Codes***

The unique facility code enables Supply Chain Manager to identify each facility. Each facility listed in Supply Chain Manager must have a unique code.

### ***Assign a Contact Person for Each SDP***

The contact person at each SDP acts as the chief point of contact regarding logistics information. He or she is responsible for the timely submission of logistics reports.

### ***Identify Products***

You must define the following for each product you wish to track:

- Unique product code
- Product description
- Product category
- Minimum shipment amount from the central supplier.



## Before Using the DRP Module

Before you can use the DRP module to manage distribution from a distribution center, you must describe delivery routes, vehicles, and personnel. First, determine the location of each facility within your distribution network. Then identify delivery vehicles as well as personnel responsible for deliveries. After you have gathered this information, define the routes that the vehicles will follow to deliver to facilities in your distribution system.

### *Identify the Distribution Center*

In the DRP module, all products are distributed from a single distribution center. Typically, this point is the central storage facility in the distribution network, but it can also be a regional or district storage facility that supplies other facilities in its immediate area. You can activate the DRP module and identify the distribution center when you configure Supply Chain Manager for first use. (See **System Configuration** in Chapter 4 for information on activating the DRP module and identifying the distribution center.)

### *Identify Delivery Vehicles*

Transport is essential to any distribution system. The DRP module allows you to define the capacity of delivery vehicles in the distribution system and decide which vehicle to assign to a particular route in accordance with cargo volume and vehicle capacity. The DRP module can also track planned and scheduled deliveries before they occur.

### *Identify Delivery Personnel*

The DRP module allows you to identify the personnel responsible for making deliveries. The module also enables you to assign delivery personnel to scheduled deliveries.

### *Define Delivery Routes*

After you have identified delivery vehicles and personnel, you then indicate the location of each facility within the distribution network. In the Product Tracking module, you defined each facility as a central storage facility, an intermediate storage facility that receives and distributes products, or an SDP that delivers products to end users. To define the distribution network, you create distribution routes, assign facilities to routes, and specify the distance and traveling time between each facility in the route and between each facility and the distribution center.

### *Using the DRP Module Effectively*

The DRP module identifies facilities most in need of resupply according to historical consumption data stored in the Product Tracking module. To do so, it estimates the current balance for each product at each facility according to the last known balance and determines how much is needed to reach the facility's maximum supply level. This process can maximize the effectiveness of limited delivery resources by scheduling deliveries according to need. When the delivery is scheduled, you can load delivery vehicles so that products destined for the neediest facilities are most easily accessible.

## Before Using Multiple-Level Installation

Before you can take advantage of Supply Chain Manager's multi-tier function, you will need to identify where your data centers will be managed. You will also need to identify which facilities will be associated with which data centers.

### *Identify Where the Data Centers Will Be Managed*

Product-tracking data can be collected at multiple points (for example, districts, regions, zones, and the like). Each location for the collection and entry of data should be identified and supplied with the resources needed for running Supply Chain Manager.


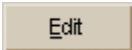


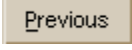
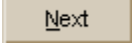
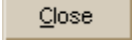
### *Identify Which Facilities Belong to Each Data Center*

Determine which facilities will submit their product-tracking reports to which data center. This information flow may follow the normal data flow of the existing logistics management information system.

# 3. Getting Started

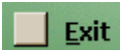
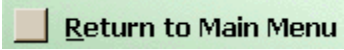
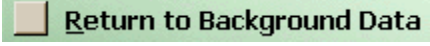
Common buttons and screen elements that are used in Supply Chain Manager are shown in table 3.1.

Table 3.1 Common Buttons

Button	Use
 <b>Add</b>	Creates a new record
 <b>Edit</b>	Edits the current record
 <b>Delete</b>	Deletes the current record (if the record can be deleted)
 <b>Print</b>	Prints the current record or report
 <b>Previous</b>	Displays the previous record in the list
 <b>Next</b>	Displays the next record in the list
 <b>Close</b>	Returns to the previous screen

Common buttons on pull-down menus are shown in table 3.2.

Table 3.2 Common Buttons on Pull-Down Menus

Button	Use
 <b>Exit</b>	Exits Supply Chain Manager
 <b>Return to Main Menu</b>	Returns to the main menu from any submenu
 <b>Return to Background Data</b>	Returns to a submenu

## Pull-Down Menus

Pull-down menus, similar to that shown in Figure 3.1, let you choose from a list. To use a pull-down menu, click the arrow next to the menu to display its list, and then click the item you wish to select. The sample in Figure 3-1 shows that Central was chosen from the Distribution Role pull-down menu.

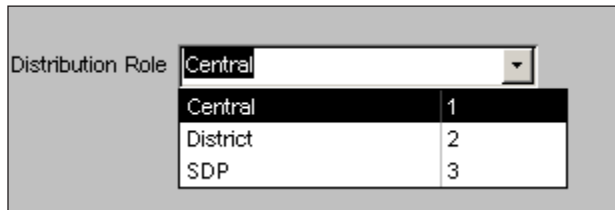


Figure 3.1 Pull-down menu.

You can also select an item from a pull-down menu by clicking on the associated field and typing the first letter of the item you wish to select.

## Navigation Bars

Navigation bars let you move from page to page in a multipage report. Figure 3.2 shows that the current page of a Supply Chain Manager report is 10.

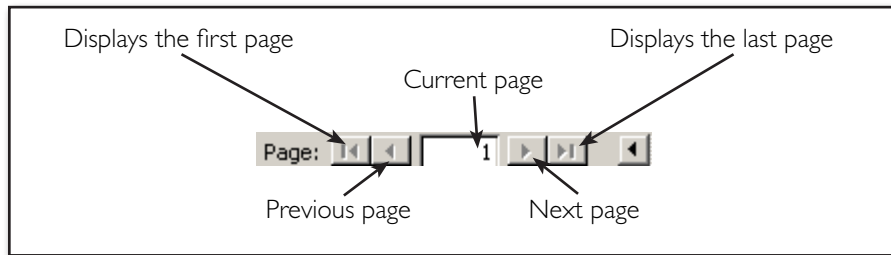


Figure 3.2 Navigation bar.

Click an arrow button at either end of the navigation bar to display a record, as shown in Figure 3.2.

## Scroll Bars

Vertical and horizontal scroll bars on some Supply Chain Manager screens let you view more data than your screen can display at one time. Click an arrow button (Figure 3.3) to move in the indicated direction.



Figure 3.3. Arrow buttons.



Figure 3.4 Vertical and horizontal scroll bars.

Figure 3.4 is an example of horizontal and vertical scroll bars. To quickly scroll through a screen, click the square button at the right end or bottom end of the horizontal or vertical scroll bar and move it up and down or left and right while holding down the left mouse button.

## Tree-View Menus

Tree-view menus represent a hierarchical data structure, such as categories and subcategories of products on the Product Tracking form or nested reporting groups on the Product Background form.

Tree menus (Figure 3.5) allow you to view all the categories, subcategories, and products in the distribution system.

To the left of each category and subcategory is a plus or minus sign. To view the subcategories and products in a category, click the plus sign. To collapse the list of subcategories and products, click the minus sign.

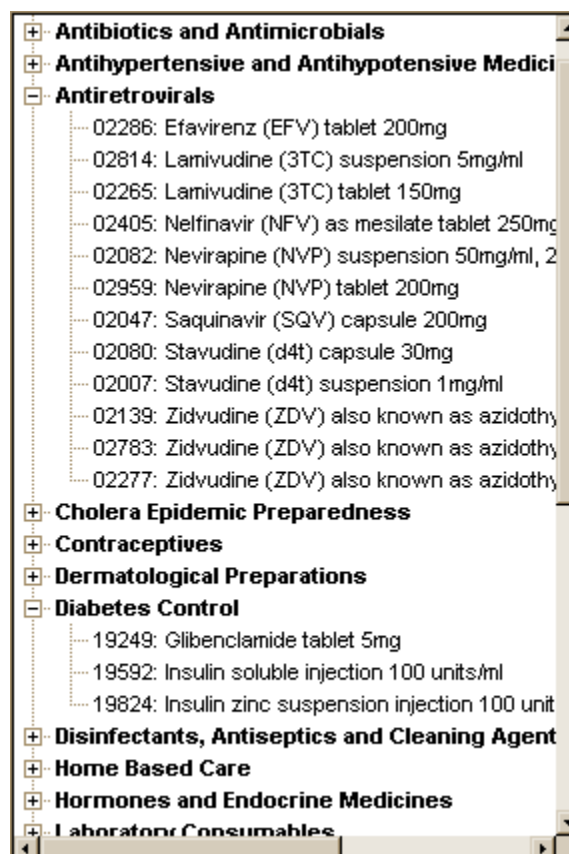


Figure 3.5 Tree menu.



## 4. System Maintenance

Before Supply Chain Manager can help manage distribution, you must define the distribution system. This section outlines the steps that set up Supply Chain Manager to manage the distribution system.

From the main menu, select the System Maintenance option.

### System Configuration

The System Configuration form outlines the design of your distribution system. You must define the system configuration the first time you use Supply Chain Manager.

1. From the System Maintenance menu, select the System Configuration option. The System Configuration form (Figure 4.1) is displayed.

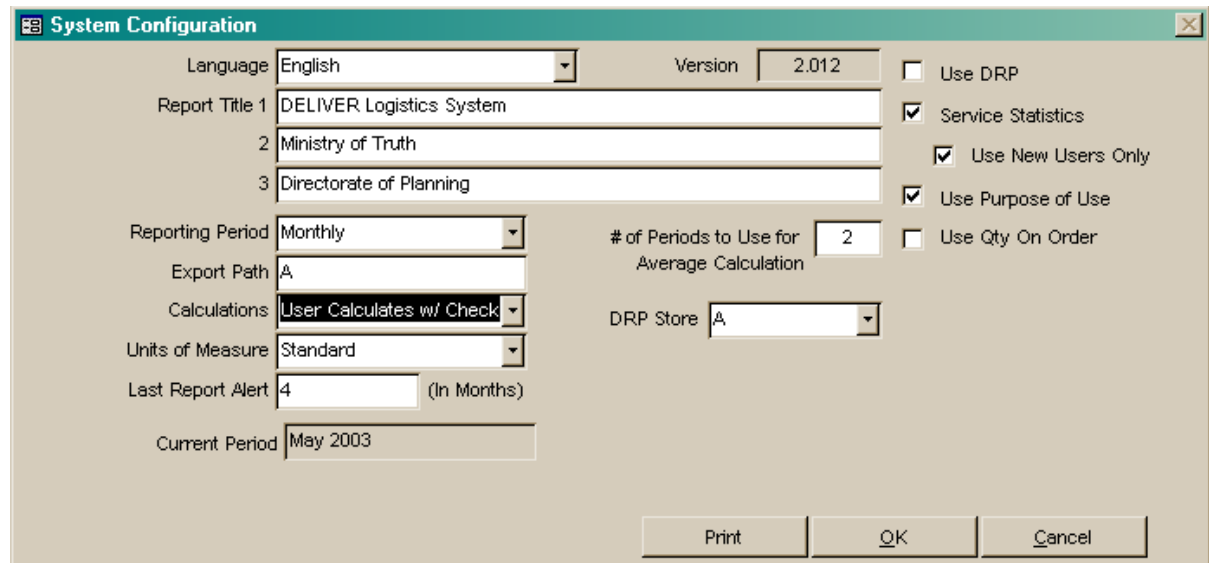
The screenshot shows the 'System Configuration' dialog box. It has a title bar with a green background and a close button. The form is divided into several sections. On the left, there are fields for 'Language' (set to 'English'), 'Report Title 1' (set to 'DELIVER Logistics System'), 'Report Title 2' (set to 'Ministry of Truth'), 'Report Title 3' (set to 'Directorate of Planning'), 'Reporting Period' (set to 'Monthly'), 'Export Path' (set to 'A'), 'Calculations' (set to 'User Calculates w/ Check'), 'Units of Measure' (set to 'Standard'), 'Last Report Alert' (set to '4 (In Months)'), and 'Current Period' (set to 'May 2003'). On the right, there are checkboxes for 'Use DRP' (unchecked), 'Service Statistics' (checked), 'Use New Users Only' (checked), 'Use Purpose of Use' (checked), and 'Use Qty On Order' (unchecked). There is also a field for '# of Periods to Use for Average Calculation' (set to '2') and a 'DRP Store' dropdown (set to 'A'). At the bottom, there are three buttons: 'Print', 'OK', and 'Cancel'.

Figure 4.1 System Configuration form.



Changes to the System Configuration form may change Supply Chain Manager's effectiveness. Consult your logistics officer or system administrator before modifying data in the System Configuration form.

The Version field is defined by the system and cannot be changed.

The Current Period field identifies the current reporting period. You cannot change this field from within the System Configuration form. The current period is changed whenever a new period is selected for data entry in the Product Tracking form.

The Report Title fields enable you to enter banners that are printed at the top left of all reports you generate—for example, the names of the department and organization managing the distribution system.



2. Click one or more Report Title fields and type text to be displayed on all Supply Chain Manager reports.

The # of Prior Periods to Use for Average Calculation field lets you specify how many reporting periods Supply Chain Manager will use when calculating average monthly consumption (AMC).

3. Click the # of Prior Periods to Use for Average Calculation field and type the number of reporting periods.

The Reporting Period field lets you define the length of a reporting period.

4. Click the arrow next to the Reporting Period field, select a reporting period from the pull-down menu, and click the left mouse button.

The Calculations field lets you determine how Supply Chain Manager performs calculations. Calculations can be performed as follows:

- Supply Chain Manager performs all calculations.
- You perform all calculations and let Supply Chain Manager validate them.
- You perform the calculations without validation.

By default, Supply Chain Manager performs all calculations.

5. Click the arrow next to the Calculations field, select a calculation option from the pull-down menu, and click the left mouse button.

The Units of Measure field lets you select the unit of measure Supply Chain Manager will use. The available units of measure are the U.S. customary system and metric.

6. Click the arrow next to the Units of Measure field, select a measuring unit, and click the left mouse button.

The DRP checkbox lets you use the distribution resource planning (DRP) module for distribution monitoring.

7. Click the checkbox to use the DRP module for distribution planning.

The DRP Store field lets you define the distribution center that will distribute products using the DRP module.

8. Click the arrow next to the DRP Store field, select a distribution center, and click the left mouse button.



Leave the DRP Store field blank if you are only using the Product Tracking module.

The Service Statistics checkbox lets you collect service statistics—new users and continuing users—for each product you track.

**9. Click the Service Statistics checkbox to enable the collection of service statistics.**

The New Users Only checkbox under the Service Statistics checkbox lets you collect data on new users only. Collecting data on expected new users for each product you track enables you to augment current consumption to meet rising demand for products such as antiretroviral drugs.

**10. Click the New Users Only checkbox to enable the collection of statistics on new users only.**

The Purposes of Use checkbox lets you collect data on one or more purposes of use for each product dispensed. For example, HIV test kits may be used for multiple purposes—voluntary counseling and testing, prevention of mother-to-child transmission, or clinical diagnosis. When this feature is activated, Supply Chain Manager records quantities of each product dispensed by purpose of use in addition to the total quantities dispensed as reported by the facility.

**11. Click the Purposes of Use checkbox to enable the collection of data on quantities of products dispensed by purpose of use.**

The Quantities on Order checkbox lets you record quantities of each product on order. These quantities are then subtracted from the calculation of the quantities required of each product to bring a facility up to the maximum stock level.

**12. Click the Quantities on Order checkbox to enable the collection of data on quantities of products on order.**

The Quantities on Hand checkbox lets you determine whether the shipment date field will be presented on the Product Tracking form.

**13. Click the Quantities on Hand checkbox to display the shipment date field on the Product Tracking form.**

The Use Category Min/Max checkbox gives you the ability to set minimum and maximum stock levels for each category associated with an individual facility.

**14. Click the Use Category Min/Max checkbox to set minimum and maximum stock levels for your facilities.**

The Adjust Quantity Required to min Shipment (AMC <1) checkbox lets you determine whether products with traditionally small AMCs (>0 and <1) be rounded up to one instead of rounded down to zero.

**15. Click the Adjust Quantity Required to min Shipment (AMC <1) to allow products with traditionally small AMCs (>0 and <1) to be rounded up to one.**

The Multi-Tier Role field lets you determine roles in a multiple-tier system on the basis of the following options:

- None: Not a multiple-tier system
- Master DB: The central level of the multiple-tier system

- Client DB: A lower-level data center that enters the tracking data
- Read Only: A complete copy of the system that cannot be written to.

Selecting the Master DB, Client DB, or Read Only option will enable you to use the Multi-Tier Reporting Tools menu to create a multi-tier reporting system. Before making this selection, however, you will need to define your facilities, products, categories, and other pertinent background data. After you define your background data, you may return to the System Maintenance form to set up your multi-tier system. See section 6, **Multi-Tier Reporting**, for more information on creating a multi-tier system.

16. Click the arrow next to the Multi-Tier Role field, select a role from the pull-down menu, and click the left mouse button.



This date should not be confused with the date system used by your computer.

The Start Date field lets you set a semipermanent starting date that Supply Chain Manager should use as a default starting date for facilities.

17. Click in the Start Date field and enter the starting date you want your facilities to use as the default date.

The Treatment Tracking field lets you determine which (if any) tracking fields will be available from the Product Tracking form, based on the following options:

- None: No tracking fields present
- TB: Tracking fields as defined for Uganda's TB program
- ART: Tracking fields as defined for Uganda's ART program.

18. Click the arrow next to the Treatment Tracking field, select a tracking option from the pull-down menu, and click the left mouse button.

The Last Report Alert field applies to the estimation of facility need in the DRP module. It lets you set the maximum time period since the last reported stock count in which need can be estimated for a particular facility.

19. Click the Last Report Alert field and type the number of months since the last stock count in which a facility's need can be estimated.

The Print button sends a copy of the System Configuration form to the printer. If you do not have access to the Supply Chain Manager software, you can use this report to review Supply Chain Manager's configuration.

20. Click Print to print the System Configuration form.
21. Click OK when you have finished entering data or when you have finished printing.

## Linked Tables

This option lets you update the location of Supply Chain Manager's database tables. When you first install Supply Chain Manager, the database tables are installed by default in the C:\Program Files\SCMgr\Data directory or in the directory you specified for installation. You can use this option to view other Supply Chain Manager databases.

1. In the System Maintenance menu, select the Linked Tables option.

The Linked Tables form (Figure 4.2) is displayed.

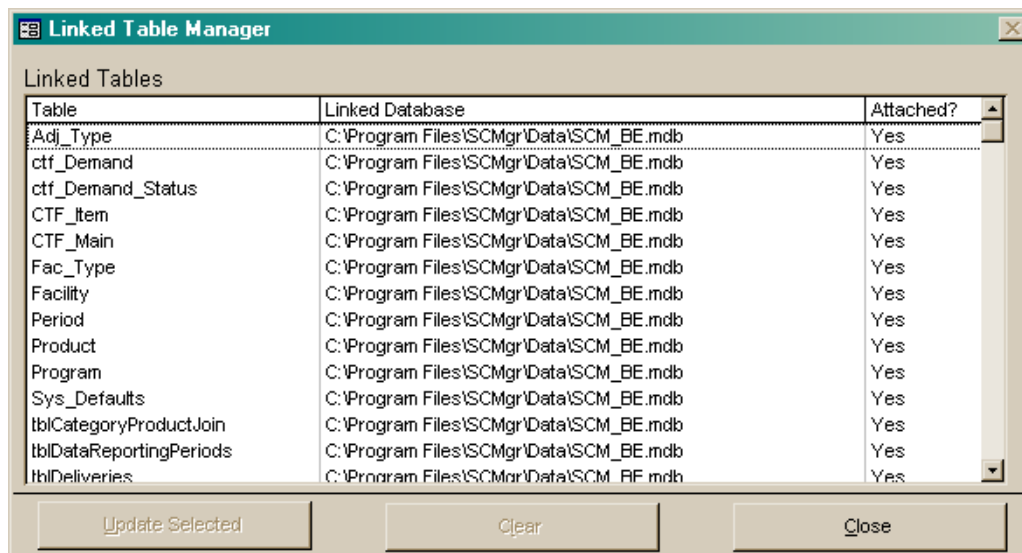


Figure 4.2 Linked Tables form.

2. Click the Browse button. The Select Database to Link to window is displayed. It is a standard Windows file selection window.
3. Locate the database to which you want to link (it will have the extension .mdb).
4. Select the database, and click the Open button. The Update button is enabled after you select the data file to which you want to link.



If the selected data file is not the currently linked data file (or if no data file has initially been selected), the status for each table will show a No under the Attached column as shown in Figure 4.2.

5. Click the Update button to link the tables of the selected data file to Supply Chain Manager.

## Creating a New Database

Supply Chain Manager is installed with a database that contains sample data. Also included in the installation is a new database that contains no data. You can review the features of Supply Chain Manager with the sample database. When you are ready to use Supply Chain Manager to track the flow of products in your distribution system, you can open the new database and start entering data.

Before you can open a new database, you must create it, as explained below:

1. Copy the scm\_be\_blank.mdb file from your Template Directory to your Data Directory.



If you installed Supply Chain Manager in its default location, the scm\_be\_blank.mdb file will be located at C:\Program Files\SCMgr\Template. Your Data Directory will be located at C:\Program Files\SCMgr\Data.

2. In the Data Directory, give the file you just copied a meaningful name. Be sure to keep the .mdb extension.
3. After you copy and rename the scm\_be\_blank.mdb file, see **Linked Tables** in this section for information on linking the new database with Supply Chain Manager.

# 5. Background Data

In the main menu, click the Background Data option. The Adjustment Types form (Figure 5.1) is displayed.

## Adjustment Types

The Adjustment Types form lets you add or modify types of adjustments to inventory, which credit or debit a facility's stock on hand. Adjustment codes and their descriptions refer to nonstandard movement of stock, such as losses, transfers, loans, and expiration. (Regular receipts and issues are not adjustments.)

Figure 5.1 Adjustment Types form.



If adjustment types come from paper-based logistical reports, changes made to the adjustment types in Supply Chain Manager must correspond with the paper-based reports.

### Adding Adjustment Types

Click Add. A blank Adjustment Types form (Figure 5.2) is displayed. Fill it out as follows:

1. Type a code for the adjustment type (one letter or number) and press <Enter>.
2. Type a name for the adjustment type.
3. Click Yes in the Debit area if the code represents a debit (stock reduction). Skip this field if the code represents a credit (stock increase).
4. Click No in the User Can Enter area if you do not wish users to record this type of adjustment. Skip this field if users are able to add, enter, and delete adjustments of this type.

Figure 5.2 Blank Adjustment Types form.

5. Click Save.
6. Repeat steps 1–5 to add more adjustment types.
7. Click Close when you have finished adding adjustment types.



DE Credit (positive adjustment) and DE Debit (negative adjustment) are computer-generated adjustments used by Supply Chain Manager to ensure that all reported figures are in balance.

### *Viewing Adjustment Types*

Two methods may be used to view adjustment types. To use method 1, follow these steps:

1. Click the arrow to the right of the Find field.
2. Select an adjustment type from the pull-down menu.
3. Click the left mouse button to display the adjustment type you selected.

To use method 2, follow these steps:

1. Click Next to display the next adjustment type.
2. Click Previous to display the previously displayed adjustment type.
3. Click Close when you have finished viewing adjustment types.

### *Editing Adjustment Types*

Edit adjustment types as follows:

1. Select the adjustment type you wish to edit.
2. Click Edit.
3. Click the field you wish to edit and type your changes.
4. If the adjustment type is no longer active, click the Active checkbox to remove the checkmark.
5. Click Save.
6. Repeat steps 1–5 to edit additional adjustment types.
7. Click Close when you have finished editing adjustment types.





You cannot delete adjustment types for adjustments that have been recorded in the Product Tracking form.

## Deleting Adjustment Types

Delete adjustment types as follows:

1. Select the adjustment type you wish to delete.
2. Click Delete. A confirmation message (Figure 5.3) is displayed, asking you to confirm the deletion.
3. Click Yes to delete the selected record. Click No to cancel.
4. Click Close when you have finished deleting adjustment types.

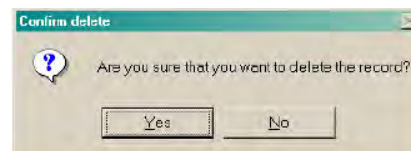


Figure 5.3 Delete confirmation message.

## Products Menu

In the main menu, click the Products option.

### Categories

The Categories form lets you group similar products. Grouping products is necessary for forecasting in order to plan and allocate resources to prevent stockouts.



You can categorize products by health programs if you associate products with programs. For example, you can categorize condoms under the AIDS-prevention program if condoms are distributed for that purpose. You can also associate one product with multiple health programs.

In the Products menu, click the Categories option. The Categories form (Figure 5.4) is displayed.

Order	Code	Description
1	11427	Aspirin tablet 300mg
2	11950	Ibuprofen tablet 200mg
3	11278	Indomethacin tablet 25mg
4	11376	Morphine sulfate suspension 10mg/5ml
5	11866	Morphine sulfate slow-release tablet 10mg
6	11419	Paracetamol suspension 120mg/5ml
7	11017	Paracetamol tablet 500mg
8	11954	Pethidine HCL injection 50mg/ml, 2ml

Figure 5.4 Categories form.

## Adding Categories

To add categories, click Add. A blank Categories form (Figure 5.5) is displayed. Then follow these directions:

1. Type the category name, and press <Enter>.

Figure 5.5 Blank Categories form.

2. Click the arrow next to the Parent Group field, select a parent category from the list, and click the left mouse button.
3. If no other categories exist, leave the parent category field blank.
4. Click Save.
5. Repeat steps 1–4 to add more categories.
6. Click Close when you have finished adding categories.

After you add a category, you must use the Products form to associate products with the category. (See **Adding Products** for more information.)

## Viewing Categories

There are two methods for viewing categories. To use method 1, follow these steps:

1. Click the arrow next to the Find field.
2. Select a category from the pull-down menu.
3. Click the left mouse button to display the selected category.

To use method 2, do the following:

1. Click Next to display the next category.

2. Click Previous to display a previously displayed category.
3. Click Close when you have finished viewing categories.

### Editing Categories

To edit categories, follow these steps:

1. Select the category you wish to edit.
2. Click Edit.
3. Change the category name.
4. Click Save.
5. Repeat steps 1–4 to edit additional categories.
6. Click Close when you have finished editing categories.

### Deleting Categories

Categories can be deleted as follows:

1. Display the category you wish to delete, and click Delete. A confirmation message (Figure 5.6) is displayed, asking you to confirm the deletion.
2. Click Yes to delete the selected record.
3. Repeat steps 1 and 2 to delete additional categories.
4. Click Close when you have finished deleting categories.

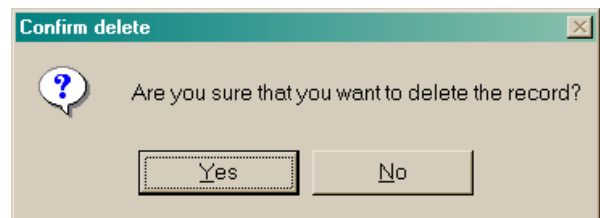


Figure 5.6 Delete confirmation message.



A category can be deleted only when all of its products are deleted or associated with a different category. See the instructions for deleting and editing products for information on changing a product's category.

### Printing the Selected Category

Click Print to create a report for the selected category.

## Products

In the Products menu, click the Products option. The Products form (Figure 5.7) is displayed.

Figure 5.7 Products form.

### Adding Products

To add products, click Add. A blank Products form (Figure 5.8) is displayed. Then, do the following:

1. Type the product code, and press <Enter>.
2. Type the product name, and press <Enter>.
3. Type the unit dose (if applicable), and press <Enter>.
4. Products that are marked as stock level indicators are used to measure the overall stock status of a particular facility. The Distribution Resource Planning (DRP) module calculates facility need based on the stock status of products that are stock level indicators. If you manage a distribution system with many products, you may choose to select only a handful of products as stock-level indicators. Click the Stock Level Indicator field if the product is a stock level indicator.

Figure 5.8 Blank Products form.

The Active flag indicates that the product is currently distributed. By default, Supply Chain Manager marks all new products as active.

The Units required per day field records the number of units of the product (tablets, bottles, and so on) that must be used by a patient each day. If the number of units required per day is less than one, enter a decimal fraction (for example, 0.25) in this field. Supply Chain Manager uses the number of units required per day to calculate the number of products required for new patients. See **Product Tracking** on for more information.

5. Type the number of units of the product that must be used by a patient each day and press <Enter>.

Some products are not kept in full supply because they are ordered by facilities only sporadically. The Non Full Supply field is used to indicate that a product is not kept in full supply. For products for which the Non Full Supply box is checked, Supply Chain Manager does not calculate or display order quantities required to bring the products up to the established maximum stock level.

6. Click the Non Full Supply field if the product is not kept in full supply.

## Shipments

The Shipments tab is composed of a Minimum Shipments area and a Shipment Volumes area.

The Minimum Shipments area lets you indicate the minimum amount that can be shipped from the supplier to storage facilities and to service delivery points (SDPs). Fill it in as follows:

1. Click the From Supplier field, type the minimum amount that can be received from the supplier, and press <Enter>.
2. Type the minimum amount to be distributed to each warehouse, and press <Enter>.
3. Type the minimum amount to be delivered to each SDP, and press <Enter>.

The Shipment Volumes area lets you indicate the volume of a single shipment unit for each product. Shipment volume is used by the DRP module to calculate how much of the product will fit on a delivery vehicle. To fill in the Shipment Volumes area, follow these steps:

1. Type the size of a single shipment unit sent by the supplier, and press <Enter>.
2. Type the size of a single shipment unit sent to each warehouse, and press <Enter>.
3. Type the size of a single shipment unit sent to each SDP.



Shipment volumes are used by the DRP module to calculate delivery loads. You may leave the shipment volume fields blank if you are not using DRP.

## Categories

The Categories tab lets you assign the product to one or more existing categories. Click the Categories tab. The list of categories (Figure 5.9) is displayed. Follow these instructions to fill out the categories tab:

1. Click the left mouse button on one or more categories to place a checkmark in the box to the left of each category.
2. The CYP Factor field lets you indicate the couple-years of protection factor for a product. This field applies only to contraceptives. Type the CYP factor in months (if applicable).
3. Click Save.
4. Click Close when you have finished adding products.

Figure 5.9 Categories tab in Products form.

### Viewing Products

There are two methods of viewing products. To use method 1, follow these steps:

1. Click the arrow next to the Find field.
2. Select a product from the pull-down menu.
3. Click the left mouse button to display the product.

To use method 2, follow these steps:

1. Click Next to display the next product.
2. Click Previous to display the previously displayed product.
3. Click Close when you finish viewing products.

### Editing Products

To edit products, follow these steps:

1. Select the product you wish to change.
2. Click Edit.
3. Click the field you wish to change, and type your changes.



4. If the product is no longer active, click the Active field to remove the checkmark.
5. Click Save.
6. Click Close when you have finished editing products.

### Deleting Products

To delete products, take the following steps:

1. Select the product you wish to delete and click Delete. A confirmation message (Figure 5.10) is displayed, asking you to confirm the deletion.
2. Click Yes to delete the record.
3. Repeat steps 1 and 2 to delete additional products.
4. Click Close when you have finished deleting products.

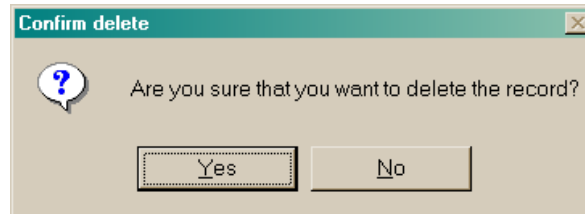


Figure 5.10 Delete confirmation message.

### Printing the Selected Product

Click Print to create a report for the selected product.

## Category and Product Order

The Category/Product Order form lets you set the order in which categories and products will appear on the Product Tracking form and in reports. You can set the order in which categories and products are displayed in Supply Chain Manager according to the format of paper-based forms or reports in the distribution system. As the distribution system expands to include additional health programs, you can add each health program's categories to Supply Chain Manager and order the products in each category.

### Viewing Category and Product Order

The list of categories, subcategories, and products in Supply Chain Manager is displayed in a tree menu on the Category/Product Order form (Figure 5.11).

You can expand or contract each category in the list by clicking on the plus or minus sign to the left of the category. When you expand a category, all subcategories and products are displayed. When you contract a category, the subcategories and products are hidden from view.

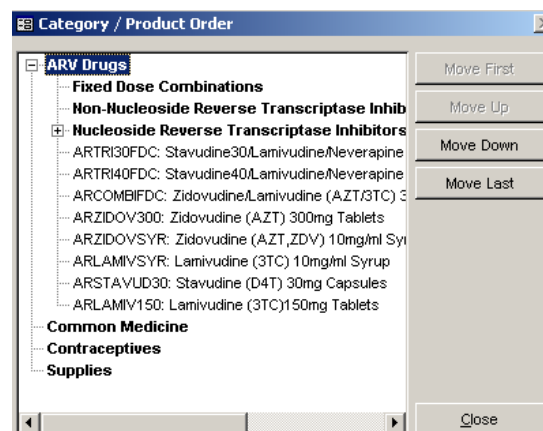


Figure 5.11 Category/Product Order form.

### Setting the Order of Categories

You can move categories within the entire list of categories. When you move a category, you also move the subcategories and products associated with that category. Categories and products are then displayed in the same order in the Product Tracking form.

In the Products menu, select Category/Product Order. The Category/Product Order form is displayed as shown in Figure 5.11.

1. Click a category you want to move.
2. Click Move Up or Move Down to move the category up or down one position.
3. Click Move First or Move Last to move the category to the first or last position.
4. Click Close when you have finished setting the order of categories.

### Setting the Order of Products

You can also move individual products within each category.

1. Click a product you want to move.
2. Click Move Up or Move Down to move the product up or down one position within the category.
3. Click Move First or Move Last to move the product to the first or last position within the category.
4. Click Close when you have finished setting the order of products.

## Distribution Levels

The Distribution Levels form (Figure 5.12) lets you define the distribution levels in the system. The table 5.1 lists sample distribution levels.

Table 5.1 Sample Distribution Levels

Distribution Level	Definition
Central	Top of the distribution hierarchy. This facility supplies other facilities.
District	Middle of the distribution hierarchy. This facility receives supplies from the central facility and distributes to lesser facilities.
SDP	Bottom of distribution hierarchy. This facility receives supplies from the district facility and distributes to end users.

In the Background Data menu, click the Distribution Levels option. The Distribution Levels form (Figure 5.12) is displayed.

### Adding Distribution Levels

To add distribution levels, click Add. A blank Distribution Levels form is displayed as shown in Figure 5.13. Follow these steps:

1. Type a name for the distribution level and press <Enter>.

The Level field lets you indicate a distribution level's position within the distribution network. Distribution levels use numerical values to denote each position, with one (1) as the highest level.

2. Type the number representing the distribution level.
3. Click the Warehouse checkbox if the distribution level represents a storage facility.

4. Click the SDP checkbox if the distribution level represents an SDP.
5. Click both Warehouse and SDP checkboxes if the distribution level represents a storage facility that also acts as an SDP.
6. Click Save.
7. Repeat steps 1–6 to add more distribution levels.
8. Click Close when you have finished adding distribution levels.

Figure 5.12 Distribution Levels form.

Figure 5.13 Blank Distribution Levels form.



Facilities are assigned to a distribution level in the Facilities form. See **Editing Facilities** for more information.

### Viewing Distribution Levels

There are two methods for viewing distribution levels. To use method 1, follow these steps:

1. Click the arrow next to the Find field.
2. Select a distribution level from the pull-down menu.
3. Click the left mouse button to display the selected distribution level.

To use method 2, follow these steps:

1. Click Next to display the next distribution level.
2. Click Previous to display the previously displayed distribution level.
3. Click Close when you have finished viewing distribution levels.

### Editing Distribution Levels

To edit the distribution levels, follow these steps:

1. Select the distribution level you wish to edit.
2. Click Edit.
3. Click the field you wish to change, and type your changes.
4. Click Save.
5. Repeat steps 1–4 to edit additional distribution levels.
6. Click Close when you have finished editing distribution levels.

### Deleting Distribution Levels



A distribution level can be deleted only after all its facilities are deleted or associated with a different distribution level. (See **Deleting Facilities** and **Editing Facilities** for more information.)

1. Select the distribution level you wish to delete.
2. Click Delete. A confirmation message (Figure 5.14) is displayed, asking you to confirm the deletion.

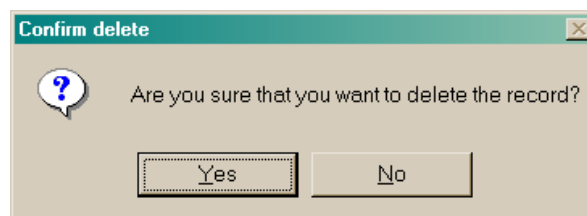


Figure 5.14 Delete confirmation message.

3. Click **Yes** to delete the selected record.
4. Repeat steps 1–3 to delete additional distribution levels.
5. Click **Close** when you have finished deleting distribution levels.

### *Printing the Selected Distribution Level*

Click **Print** to create a report for the selected distribution level.

## **Facilities Menu**

In the main menu, click the **Facilities** option.

### *Facility Types*

The **Facility Types** form lets you classify the facilities in the distribution system. Distinguishing facility types facilitates forecasting, which enables you to plan and allocate resources to prevent stockouts.

The screenshot shows the 'Facility Types' window. At the top is a title bar with the text 'Facility Types'. Below the title bar is a 'Find' dropdown menu. Underneath are two input fields: 'Type Name' and 'Level'. To the right of these fields is a 'Facility Count' label with a value of '0'. Below the input fields are two tabs: 'Facilities' and 'Products'. The 'Facilities' tab is selected, and it contains a table with three columns: 'Facility Code', 'Facility Name', and 'City'. The table is currently empty. At the bottom of the window are two buttons: 'Save' and 'Cancel'.

Figure 5.15 Facility Types form.

Click the **Facility Types** option. The **Facility Types** form (Figure 4.15) is displayed.

### Adding Facility Types

To add facility types, do the following:

1. Click Add. A blank Facility Types form (Figure 5.16) is displayed.
2. Type the facility type name.

The Level field lets you indicate the facility type's position in the distribution network. Distribution levels listed in this field are the ones you entered in the Distribution Levels form.

3. Click the arrow next to the Level field, select a distribution level from the pull-down menu, and click the left mouse button.

Facility Types

Find

Type Name

Level

Facility Count

**Facilities** **Products**

Facilities

Facility Code	Facility Name	City
J	Doing Good NGO	Good City
L	International NGO	Capitol City

Add Edit Previous Next Print Delete Close

Figure 5.16 Blank Facility Types form.



Facilities are assigned to a facility type in the Facilities form. (See **Editing Facilities** for more information.)

## Adding Products to Facility Types

You can assign products to a facility type in the Products tab. The products you assign to a facility type are the ones facilities belonging to that facility type can stock and dispense. For example, a program for HIV/AIDS care and treatment may have a limited number of facilities that are capable of providing antiretroviral therapy (ART). Therefore, antiretroviral drugs would be assigned to a facility type designated as an ART service site.

To add products to a facility type, do the following:

1. Click the **Products** tab. The list of products (Figure 5.17) is displayed.
2. In the Available Products area, click the product you want to assign to this facility type. Select multiple products by pressing <Ctrl> as you click each product.
3. Click the right arrow to move the selected product to the Issued Products area.

**Facility Types**

Find

Type Name

Level

Facility Count

**Facilities** **Products**

Available Products

ARLAMIV150: Lamivudine (3TC)1	Nucleoside Reverse T
ARZIDOV300: Zidovudine (AZT) 3	ARV Drugs
ARZIDOVSYR: Zidovudine (AZT) 4	ARV Drugs
ARLAMIVSYR: Lamivudine (3TC) 4	ARV Drugs
ARSTAVUD30: Stavudine (D4T) 3	ARV Drugs
ARSTAVUD40: Stavudine (D4T) 4	ARV Drugs
ARDIDANO25: Didanosine (DDI) 1	ARV Drugs
ARDIDAN100: Didanosine (DDI) 1	ARV Drugs
ARDIDAN200: Didanosine (DDI) 2	ARV Drugs
ARNEVIR200: Nevirapine (NVP) 2	ARV Drugs
ARNEVIRSYR: Nevirapine (NVP) 4	ARV Drugs
AREFAVI600: Efavirenz (EFV) 60	ARV Drugs

Issued Products

ARTRI30FDC : Stavudine30/Lamivudine30	ARV Drugs
ARTRI40FDC : Stavudine40/Lamivudine40	ARV Drugs
ARCOMBIFDC : Zidovudine/Lamivudine	ARV Drugs

Add Edit Previous Next Print Delete Close

Figure 5.17 Product list in Facility Types form.

4. Repeat steps 2 and 3 to add more products to the facility type.
5. Click **Save**.
6. Click **Close** when you have finished adding products to the facility types.



If the Products tab does not list products, you must first add products. (See **Adding Products** for more information.)

### **Removing Products from Facility Types**

Products can be removed from a facility type as follows:

1. In the Issued Products area, click the product you want to remove from the facility type.
2. Click the left arrow to move the selected products to the Available Products area.

### **Viewing Facility Types**

Two methods are used to view the facility types. To use method 1, follow these steps:

1. Click the arrow next to the Find field.
2. Select a type from the pull-down menu.
3. Click the left mouse button to display the selected facility type.

To use method 2, follow these steps:

1. Click Next to display the next facility type.
2. Click Previous to display the previously displayed facility type.
3. Click the Products tab to view products that are associated with the selected facility type.
4. Click Close when you have finished viewing facility types.

### **Editing Facility Types**

To edit the facility types, follow these steps:

1. Select the facility type you wish to edit.
2. Click Edit.
3. Click the field you wish to change, and type your changes.
4. Click the Products tab to add or remove a product.
5. Click the product you wish to add to or remove from the facility type.
6. Click the right arrow or left arrow to add the product to or remove the product from the facility type.
7. Repeat steps 1–6 to edit additional facility types.
8. Click Save.
9. Click Close when you have finished editing facility types.



### Deleting Facility Types

Delete facility types as follows:

1. Select the facility type you wish to delete. Note that if the selected facility type has associated facilities, you must first delete or reassociate the facilities.
2. Click Delete. A confirmation message (Figure 5-18) is displayed, asking you to confirm the deletion.
3. Click Yes to delete the selected record.
4. Repeat steps 1–3 to delete additional facility types.
5. Click Close when you have finished deleting facility types.

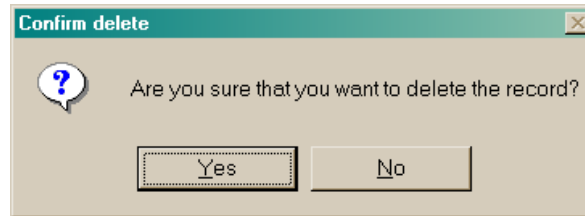


Figure 5.18 Delete confirmation message.

### Printing the Selected Facility Type

To print a report for the selected facility type, follow these steps:

1. Click Print.
2. After the report is created and the first page is displayed, click the Print icon to print the report.
3. Click Close in the print menu to return to the Facility Types form.
4. Click Close when you have finished printing facility types.

## Facility Type Groups

Use the Type Groups form to group facility types. This feature allows you to group two or more facility types in order to view aggregated data on the stock status and performance of those facilities. For example, to fulfill the information needs of program managers, you may create facility type groups according to the types of services each facility type offers. Examples include facilities that offer ART services or facilities that offer NORPLANT®. Grouping several facility types in this way helps identify facilities that provide special services and the specific products associated with those services.

Click the Facility Type Groups option. The Type Groups form (Figure 5.19) is displayed.

Figure 5.19 Type Groups form.

## Adding Facility Type Groups

You can add facility type groups as follows:

1. Click Add. A blank Type Groups form (Figure 5.20) is displayed.
2. Type the facility type group name.
3. Click Save.
4. After you save the group name, click Edit to add facility types.
5. Select one or more facility types in the Available Types window, and click Add.
6. Click Save.

Figure 5.20 Blank Type Groups form.

7. Repeat steps 1–6 to add more facility type groups.
8. Click Close when you have finished adding facility type groups.

### **Viewing Facility Type Groups**

Two methods are used to view facility type groups. To use method 1, follow these steps:

1. Click the arrow next to the Find field.
2. Select a group from the pull-down menu.
3. Click the left mouse button to display the selected group.

To use method 2, follow these steps:

1. Click Next to display the next group.
2. Click Previous to display the previously displayed group.
3. Click Close when you have finished viewing facility type groups.

### **Editing Facility Type Group Names**

To change a facility type group name, follow these steps:

1. Select the facility type group you wish to change.
2. Click Edit.
3. To change the facility type group name, type the group name in the Group Name field.

### **Editing Facility Types within a Group**

These steps must be followed when you edit facility types within a group:

1. To remove a facility type from the group, click the facility type in the Selected Types window and click the left arrow.
2. To add a facility type to the group, click the facility type in the Available Types window and click the right arrow.
3. Click Save.
4. Repeat steps 1–3 to add facility types to or remove facility types from a group.
5. Click Close when you have finished editing facility type groups.

## Deleting Facility Type Groups

Use the following steps to delete facility type groups:

1. Select the facility type group you wish to delete. To select more than one facility type, hold down the <Ctrl> or <Shift> keys while clicking the facility type name.
2. Click Delete. A delete confirmation message (Figure 5.21) is displayed, asking you to confirm the deletion.
3. Click Yes to delete the selected record.
4. Repeat steps 1–3 to delete additional facility type groups.
5. Click Close when you have finished deleting facility type groups.

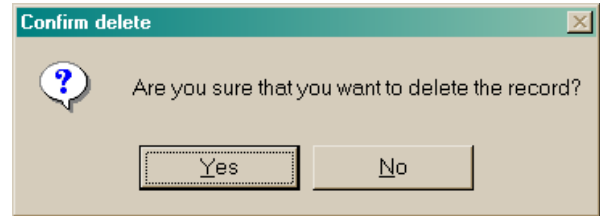


Figure 5.21 Delete confirmation message.



A facility type can be deleted only after all associated facilities are deleted or associated with a different facility type. (See **Deleting Facilities** and **Editing Facilities** for more information.)

## Printing the Selected Facility Type Group

1. Click Print to create a report for the selected group.
2. After the report is created and the first page is displayed, click the Print icon to print the report.
3. Click Close on the Print Menu to return to the Type Groups form.
4. Click Close when you have finished printing the selected facility type group.

## Facilities

In the Facilities menu, click the Facilities option. The Facilities form (Figure 5.22) is displayed.

**Facility Information**

Find Facility:

Code:  Name:  Active: ☒

Supplier:   ☒

Facility Type:

Site Contact:

Address:

City:  Region/State:  ZIP Code:

Phone:  FAX:

Distribution Role:  Maximum Stock in MOS:

Warehouse: ☐ Minimum Stock in MOS:

Dispense to Users: ☒

Figure 5.22 Facilities form.

### Adding Facilities

To add facilities, follow these steps:

1. Click Add. A blank Facilities form (Figure 5.23) is displayed.

**Facility Information**

Find Facility:

Code:  Name:  Active: ☒

Supplier:   ☒

Facility Type:

Site Contact:

Address:

City:  Region/State:  ZIP Code:

Phone:  FAX:

Distribution Role:  Maximum Stock in MOS:

Warehouse: ☐ Minimum Stock in MOS:

Dispense to Users: ☐

Figure 5.23 Blank Facilities form.

2. Each facility requires a unique facility code. Type a unique code and press <Enter>.
3. Type the facility name and press <Enter> twice.

The Supplying Facility field indicates the facility that distributes products to the current facility. In the case of a central storage facility, the supplying facility is always zero (0), indicating that the supplier is outside the distribution system.

4. Click the arrow next to the Supplying Facility field, select a supplying facility from the pull-down menu, and click the left mouse button.

The Active field indicates that the facility is currently part of the distribution system. New facilities are active by default.

5. Click the arrow next to the Facility Type field, select a type from the pull-down menu, and click the left mouse button.
6. The Site Contact field identifies the facility's contact person. Type the contact person's name and press <Enter>.
7. The Address, City, Region/State and Postal Code fields are for the facility's address. Type the facility's address and press <Enter>.
8. Type the facility's phone number and press <Enter>.
9. Type the facility's fax number and press <Enter>.
10. The Distribution Role field lets you indicate the facility's position in the distribution network. These levels are established in **Adding Distribution Levels**. Click the arrow next to the Distribution Role field, select a distribution level from the pull-down menu, and click the left mouse button.
11. The Warehouse checkbox indicates that the facility is a storage facility. In most cases, central- and district-level facilities are warehouses (an SDP can be a warehouse, even though it distributes to end users). By default, the Warehouse checkbox is unchecked to show that the facility is not a warehouse. Click the Warehouse checkbox if the facility is a warehouse.
12. The Dispense to Users checkbox indicates that the facility distributes to end users. By default, the Dispense to Users checkbox is checked. Click the Dispense to Users checkbox to remove the check if the facility does not distribute to end users.



Make sure to add the top-level storage facility first. The top-level storage facility is directly and indirectly responsible for supplying all other facilities in the distribution network. Always add facilities from the top down (for example, central facilities first, district facilities second, SDPs third). This method lets you select the supplying facility as you add each facility.

The Max/Min Levels tab (if enabled) lets each facility in your system define a maximum and minimum stock level for each product category.

13. Click the Max/Min Levels tab. The Max/Min Levels form is displayed as shown in sample Figure 5.24.

Category	Maximum Months of Stock	Minimum Months of Stock
CLASS A: Tablets	3	1
CLASS B: Injectables	3	1
CLASS E: Genuicals	3	1
CLASS F: Surgical Dressings	3	1
CLASS G: Sutures	3	1
CLASS H: Surgical Equipment	3	1
CLASS K:	3	1
CLASS M	3	1
Contraceptives and STI Drugs	3	1

Figure 5.24 Sample Max/Min Levels tab.

Minimum and maximum months of stock describe the stock level a facility should maintain. These values show the maximum allowable stock level a facility can have and the minimum level a facility can reach before needing resupply. For example, SDPs may require a maximum of three months' worth of supplies and a minimum of one month's. A central warehouse may need a maximum of six months' worth of supplies and a minimum of three months'.

14. Click the Maximum Months of Stock field, and type the maximum stock level in months.
15. Click the Minimum Months of Stock field, and type the minimum stock level in months.
16. Click Save.
17. Repeat steps 1–16 to add more facilities.
18. Click Close when you have finished adding facilities.

### Viewing Facilities

Three methods are used to view facilities. To use method 1, follow these steps:

1. Click the arrow next to the Find Facility field.
2. Select a facility from the pull-down menu.
3. Click the left mouse button to display the selected facility.

To use method 2, follow these steps:

1. Click Next to display the next facility.
2. Click Previous to display the previously displayed facility.

To use method 3, follow these steps:

1. Click Filter. The Facility Filter form (Figure 5.25) is displayed. This form displays search criteria you can use to find a particular facility.

Figure 5.25 Facility Filter form.

2. Click the arrow next to the filter to search by, select an option from the pull-down menu, and click the left mouse button.
3. Click the State/Region or City fields or both, and type of the name of the state, region, or city to search by.
4. Click Set Filter. Facilities matching the search criteria are displayed in alphabetical order by facility name.
5. To clear the filter results and display all facilities, click Clear Filter. The first facility in the list of all facilities is displayed.
6. Click Close when you have finished viewing facilities.

### Editing Facilities

To edit facilities, follow these steps:

1. Select the facility you wish to edit.
2. Click Edit.
3. Click the field you wish to change, and type your changes.
4. If the facility is no longer active, click the Active checkbox to remove the checkmark.



5. Click Save.
6. Repeat steps 1–5 to edit additional facilities.
7. Click Close when you have finished editing facilities.

### Deleting Facilities

To delete facilities, follow these steps:

1. Select the facility you wish to delete.
2. Click Delete. A confirmation message (Figure 5.26) is displayed, asking you to confirm the deletion.
3. Click Yes to delete the selected record.
4. Repeat steps 1–3 to delete additional facilities.
5. Click Close when you have finished deleting facilities.

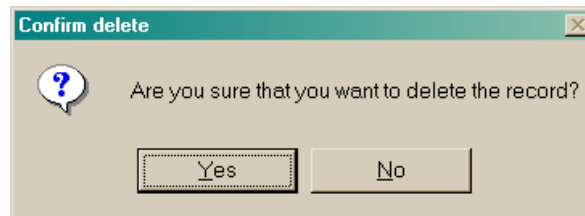


Figure 5.26 Delete confirmation message.



A facility cannot be deleted if it has product-tracking records. An alert message is displayed if a facility cannot be deleted.

### Printing the Selected Facility

To print, follow these steps:

1. Click Print to create a report for the selected facility.
2. After the report is created and the first page is displayed, click the Print icon to print the report.
3. Click Close on the Print Menu to return to the Facilities form.
4. Click Close when you have finished printing facilities.

## Purpose of Use

The Purpose of Use feature lets you indicate for what purpose a product (or group of products) will be used. This feature becomes available when the Purpose of Use field is checked during system maintenance. See **System Maintenance** for more information.

In the Background Data menu, click the Purpose of Use option. The Purpose of Use form (Figure 5.27) is displayed

Figure 5.27 Purpose of Use form.

### Adding Purpose of Use

To add the purpose of use, follow these steps:

1. Click Add. A blank Purpose of Use form (Figure 5.28) is displayed.

Figure 5.28 Blank Purpose of Use form.

2. Type a code or name for the purpose of use.

The checkmark in the Active field indicates that the purpose of use is currently in use.

3. Click Save.
4. Click Close when you have finished adding purpose of use.

### Viewing Purpose of Use

There are two methods for viewing the purpose of use. To use method 1, follow these steps:

1. Click the arrow next to the Find field.
2. Select a purpose of use from the pull-down menu.
3. Click the left mouse button to display the selected purpose of use.

To use method 2, follow these steps:

1. Click Next to display the next purpose of use.
2. Click Previous to display the previously displayed purpose of use.

### *Editing Purpose of Use*

To edit the purpose of use, follow these steps:

1. Select the purpose of use you wish to edit.
2. Click Edit. The Purpose of Use field will be selected for editing.
3. Type any desired changes in the Purpose of Use field.
4. If the purpose of use is no longer active, click the Active checkbox to remove the checkmark.
5. Click Save.
6. Repeat steps 1–5 to edit additional purposes of use.
7. Click Close when you have finished editing facilities.

### **Deleting Purposes of Use**

To delete purposes of use follow these steps:

1. Select the purpose of use you wish to delete.
2. Click Delete.

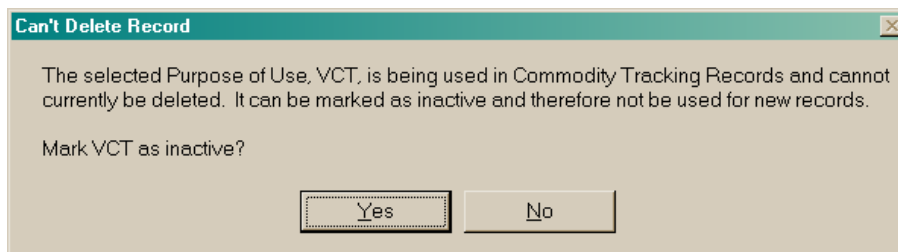


Figure 5.29 Delete purpose of use alert message.

3. If product-tracking records are associated with the selected purpose of use, a message (Figure 5.29) is displayed, asking you to mark the purpose of use inactive. Click Yes to mark the selected purpose of use inactive.

4. If no product-tracking records are associated with the selected purpose of use, a confirmation message (Figure 5.30) is displayed, asking you to confirm the deletion. Click Yes to delete the selected purpose of use.
5. Repeat steps 1–4 to delete additional purposes of use.
6. Click Close when you have finished deleting purposes of use.

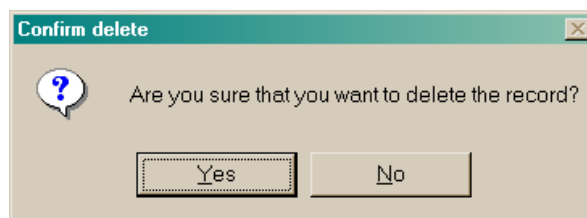


Figure 5.30 Delete confirmation message.

## Reporting Groups

The reporting groups feature helps you classify facilities as part of one of more groups for reporting purposes.

From the Background Data menu, click the Reporting Groups option. The Reporting Groups form is displayed similar to the sample in Figure 5.31.

Facility Code	Facility Name
AAR01	Africa Air Rescue Health
ABE01	Aber District Hospital
ABE02	Pope Johns Hospital Aber
ADJ01	Adjumani Hospital
ANA01	Anaka Hospital
ANG01	Angal Hospital
APC01	Apac District Hospital
ARU01	Arua Regional Referral Hc
ATU01	Atur Hospital

Facility Code	Facility Name	Inherited?
---------------	---------------	------------

Figure 5.31 Sample Reporting Groups form.

This form lets you create reporting groups and assign facilities to each group. The following options may be applied to each group:

- Accept Facilities in this group. This option lets you determine whether the group allows users to assign facilities to the group.
- Allow Rollups. This option lets you determine whether users are allowed to roll up reporting data according to the group. This feature, however, is currently unavailable.
- Includes child members. This option lets you determine whether the group will consider members of child groups as its members. (This option allows grouping of groups.) You should select this option if you have chosen not to allow rollups (that is, if the Allow Rollups field is not selected).

## Creating a Reporting Group

To create a reporting group, follow these steps:

1. Click the Add button. A blank Reporting Groups form is displayed similar to the sample in Figure 5.32.

Reporting Groups

Find

Group Name

Parent Group

Accept Facilities in this group ☒ Allow Rollups ☒ Includes child's members ☐

Facilities Not in Group

Facility Code	Facility Name
AAR01	Africa Air Rescue Health
ABE01	Aber District Hospital
ABE02	Pope Johns Hospital Aber
ADJ01	Adjumani Hospital
ANA01	Anaka Hospital
ANG01	Angal Hospital
APC01	Apac District Hospital
ARU01	Arua Regional Referral Hc
ATU01	Atur Hospital

Facilities Included

Facility Code	Facility Name	Inherited?
---------------	---------------	------------

Facility Count 0

Save Cancel

Figure 5.32 Blank Reporting Groups form.

2. Click the Group Name field, and type the reporting group's name.
3. Click the Parent Group field, and type the name of the reporting group's parent group.



If the reporting group will not have a parent group, select <none> from the pull-down menu in the Parent Group field.

4. Click the field Accept Facilities in this Group or Includes child members, or both, as needed. These fields can be skipped if they do not apply to the reporting group you are creating.



If the Inherited? column shows an X, the facility is a member of an included child group.

5. The Facilities Included box shows all facilities considered part of the group. Facilities may be added to the Reporting group by selecting those listed in the Facilities Not in Group box. Click the facility in the Facilities Not in Group box that you want to make part of the group.
6. Click the move button.

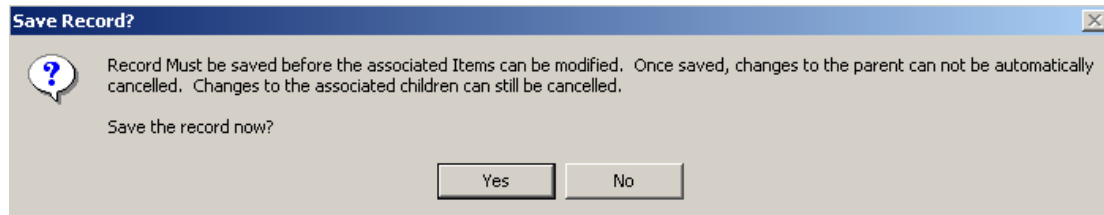


Figure 5.33 Sample message box.

A message box similar to the one in sample Figure 5.33 may appear.

7. Click **Yes** to save the selected facilities to the group you created. The selected facilities are moved to the Facilities Included box.
8. Click the **Save** button to complete the process.

You can select multiple facilities at one time using either of two methods:

To use method 1, follow these steps:

9. Hold down the <Ctrl> key, and click each facility you want to include.
10. Click the move button.

To use method 2, follow these steps:

11. Click the first facility you want to include.
12. Scroll down to the last facility you want to include.
13. Hold down the <Shift> key, and click the last facility you want to include.

This method will select all facilities from the first one selected to the last.

### *Editing Reporting Groups*

To edit reporting groups, follow these steps:

1. Select the reporting group you need to edit and click the **Edit** button. The Group Name field will be selected for editing.
2. Click in the fields you need to edit and make the required changes.

You can remove one or more facilities from a group by either of two methods. To use method 1, follow these steps:

1. Hold down the <Ctrl> key and click each facility you want to exclude.
2. Click the move button.

To use method 2, follow these steps:

1. Click the first facility you want to include.
2. Scroll down to the last facility you want to include.
3. Hold down the <Shift> key, and click the last facility you want to exclude.
4. Click the move button.
5. Click the Save button to complete the process.

### *Deleting a Reporting Group*

To delete a reporting group, follow these steps.

1. Select the reporting group you want to delete.
2. Click the Delete button. A confirmation message similar to the sample in Figure 5.34 is displayed.
3. Click the Yes button to delete the selected report group.
4. Repeat steps 1–3 to delete additional reporting groups.
5. Click the Close button when you finish deleting reporting groups.

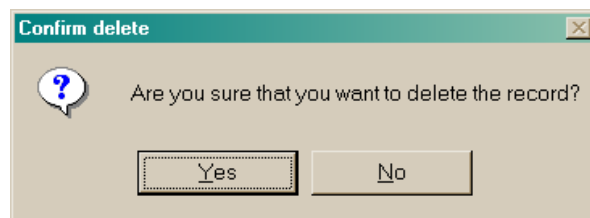


Figure 5.34 Deletion confirmation message.

# 6. Multi-Tier Reporting

Multilevel reporting allows you to distribute the responsibility for data entry among several locations. This method removes the need to transport paper reporting forms from one location to another.

A typical multi-tier system consists of a centrally managed database (the Master DB) and a number of data collection points called data centers. The Master DB manages background information (that is, categories, product definitions, facility types, and the like). Data centers enter product tracking information for the facilities under their supervision.

Data centers are created by the Master DB.



A multi-tier system can only be created by selecting a role from the Multi-Tier Role field on the System Configuration form.

## Enabling Multi-Tier Reporting

You can enable multi-tier reporting from an existing database. These are the steps:

Access the System Configuration form. If the form has not been completed, see **System Configuration** for information on completing the System Configuration form.

1. At the Multi-Tier Role field, select Master DB from the field's associated pull-down menu.



You must create a Master DB before you can associate data centers.

2. Click the System Configuration form's OK button to save the Multi-Tier Role and close the form. You will be returned to the System Configuration submenu.
3. Select the Multi-Tier Reporting Tools option to proceed to the Multi-Tier Reporting Tools submenu.

## Data Center Management

The Data Centers option lets you associate data centers with the current Master DB.

1. Click the Data Centers option. The Data Center Management form appears similar to Figure 6.1.

Data Centers	Contact E-mail
East Center	Ecenter@a.com
Midland Center	Mland@a.com
North Center	Ncenter@a.com
South Center	Scenter@a.com
West Center	Wcenter@a.com

Figure 6.1 Data Center Management form.



## Adding a Data Center

Use the Add button to add Data Centers:

1. Click the Add button. The Multi-Tier Data Centers form (Figure 6.2) is displayed so you can enter basic information about data centers.
2. The Data Center Name field lets you identify the data center. Click the Data Center Name field and type the data center's name.
3. The E-mail field lets you indicate the data center's email address. Click in the E-mail field and enter the data center's email address.

Figure 6.2 Multi-Tier Data Centers form.



The Facilities area shows the supply chain of facilities in the current system. If the facility you want to associate is not listed, you will have to add it. Entries listed in this area are added through the Add Facilities operation detailed in section 4 of this manual.

4. To associate a facility with a data center, click the box corresponding to the facility you want to associate.



Facilities displayed in red are already managed by another data center. Each facility can be a part of only one data center.

5. After you select the facilities you want to associate, click the Save button to save your selection.

## Building the Data Center File

After you define a data center, you will need to build the data center record. Building the data center record simply means creating a database file for a newly defined data center, which is a necessary step before importing and exporting data. To create the data center record, follow these steps:

1. Select the data center you need to build a data center record for.
2. Click the Build button.

The system builds the file and displays a message box similar to Figure 6.3.

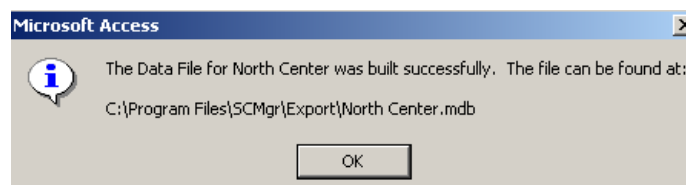


Figure 6.3 Data file completion message.

## Editing Data Center Information

The data of an existing data center can be edited as follows:

1. From the System Maintenance menu, select the Multi-Tier Reporting Tools option, and select the Data Centers option from the Multi-Tier Reporting Tools menu. The Data Center Management form (Figure 6.1) is displayed.
2. Select the data center you want to edit. When you select a data center, the Edit button becomes active.

Figure 6.4 Sample Multi-Tier Data Centers form.

3. Click the Edit button to display the Multi-Tier Data Centers form. The Multi-Tier Data Centers form appears similar to Figure 6.4.

Facilities associated with the selected data center are marked with a checkmark (✓) as shown in Figure 6.4. Facilities in red are associated with other data centers. You can associate any of them with the current data center.

4. Make the necessary changes and click the Save button.

## Deleting a Data Center

A data center can be deleted as follows:

1. From the System Maintenance menu, select the Multi-Tier Reporting Tools option to display the Multi-Tier Reporting Tools menu.
2. Select the Data Centers option. The Data Center Management form (Figure 6.1) is displayed.

Before you can delete a data center, you must first disassociate all facilities associated with the data center selected for deletion. If you try to delete a data center that still has associated facilities, an error message similar to the sample in Figure 6.5 is displayed.

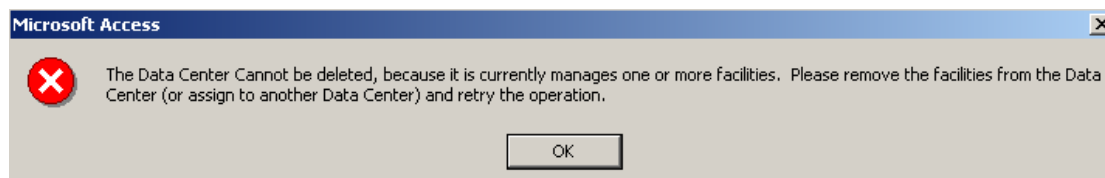


Figure 6.5 Sample error message.



All facilities associated with the selected data center will be marked with a checkmark (✓).

3. To disassociate facilities from a data center selected for deletion, click the Edit button and search for all facilities associated with the data center selected for deletion.
4. Click every checked facility to remove the checkmark (✓) to disassociate the facility.
5. Click the Save button to save your changes.
6. Now, with the data center chosen for deletion still highlighted, click the Delete button. A confirmation message is displayed, asking if you are sure that you want to delete the selected data center.
7. Click the Yes button to delete the selected data center. The selected data center is deleted from the Data Centers Management form.

### Exporting Data Center Information

Data from the data center can be exported to update the background data of the remote data centers. The data compiled for export consists of background table changes that can be sent to a managing data center. To create an export file, follow these steps:

1. Select the data center for which you want to create an export file.
2. Click the Export File button. The system will create the export file and display a message box similar to Figure 6.6.

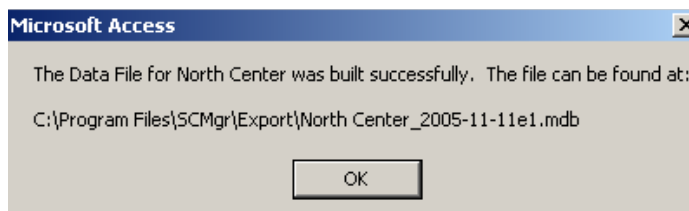


Figure 6.6 Export file completion message.

### Importing Data Center Information

This feature is used to create (or re-create) a data center in a master database file from a wizard file (.wiz) as created from a lower-level data center. Data from subordinate data centers can be pulled into a managing data center for incorporation into a master database. This operation accomplishes three tasks:

- It allows the import of multi-tier data files.
- It performs a validation check on files selected for import.
- It ensures that selected files are of a valid type for the current data center.

To import a data file, follow these steps:

1. Click the Import button. The Import Datacenter File form is displayed (Figure 6.7).

The File field identifies the file to be imported. This field has an associated Get File button that helps you locate the file you need to import.



Figure 6.7 Import Datacenter File form.

2. Click the Get File button. The Select Database File to Import window is displayed (Figure 6.8). This standard Windows file selection window operates like any other Windows file selection window.
3. Locate and select the data file you need to import.
4. Click the Open button. Basic information about the selected file is displayed on the Import Datacenter File form (see Figure 6.9).

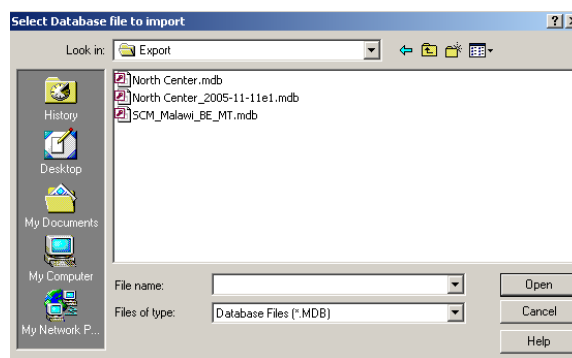


Figure 6.8 Select Database File to Import window.

Figure 6.9 Sample Import Datacenter File form.



You cannot edit any fields associated with the Import Datacenter File form.

5. Click the Import button to import the data associated with the selected data center. The data associated with the selected data center are imported.
6. Repeat steps 1–5 to import data from additional data centers.
7. Click the Close button to close the import form when you have finished importing data.

## Viewing Log Files

The Log Files button lets you view a data center's import and export history. To view a log file, complete these steps:

1. Select the data center with the import-export history for which you want to create a log.
2. Click the Log Files button.

The import-export history of the selected data center displayed will be similar to that in Figure 6.10.

File ID	Date	Transfer Type	File Name	Notes
0	11/11/2005 11	Setup	North Center.mdb	Created initial export
1	11/11/2005 11	Background Export	North Center_2005-11-11e1.mdb	Created Background

Figure 6.10 Sample import-export log file.

3. Click the Close button to close the window.
4. Click the Close button on the Data Center Management form to close the form.

## Converting Database to Multi-Tier Center

This procedure helps you take an existing flat data system and turn it into a multi-tier system:

1. Access the System Configuration form.
2. At the Multi-Tier Role field, select Master DB from the field's associated pull-down menu.



You must create a Master DB before you can associate data centers.

3. Click the System Configuration form's OK button to save the Multi-Tier Role and close the form. You will be returned to the System Configuration submenu.
4. Select the Multi-Tier Reporting Tools option to proceed to the Multi-Tier Reporting Tools submenu.
5. Select the Data Centers option to display the Data Center Management form (Figure 6.1).
6. Click the Add button to add a data center. The Multi-Tier Data Centers form (Figure 6.2) is displayed so you can enter basic information about data centers.
7. Enter the data center's name and email address.

The Facilities area shows the facility types associated with the current system. Entries listed in this area are added through the Add Facility Types operation detailed in section 4 of this manual.

1. To associate a facility type with a data center, click the box corresponding to the facility type you want to associate.



Facilities displayed in red are already managed by another data center. Each facility can be a part of only one data center.

2. After you select the facilities you want to associate, click the Save button to save your selections.
3. Select the new data center from the data center list, and click the Build button to create the starter database for the data center. A confirmation message similar to the sample in Figure 6.11 is displayed to let you know that the data center file has been created.

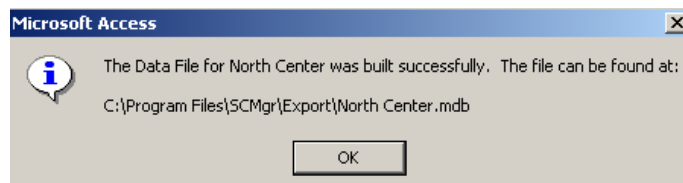


Figure 6.11 Data center file confirmation message.

4. Click the OK button.
5. To use the new database, copy it to your Data Directory.



If you installed Supply Chain Manager in its default location, you will find the Data Directory at C:\Program Files\SCM.

6. See **Linked Tables** in the system maintenance section of this manual to link the new database to Supply Chain Manager.

### *Creating a Multi-Tier System from Existing Multiple Supply Chain Manager Data Files*

From an existing database, you can create a multi-tier system as follows:

1. Click the System Maintenance option of the main menu.
2. Click the System Configuration option of the System Maintenance menu.
3. Click the Multi-Tier Reporting Tools option.
4. Click the Convert Database to Multi-Tier Data Center option. The Multi-Tier Data Centers form (Figure 6.12) is displayed so you can enter basic information about data centers.
5. The Data Center Name field lets you identify the data center.
6. Click in the Data Center Name field and type the data center's name.
7. The E-mail field lets you indicate the data center's email address.
8. Click in the E-mail field and enter the data center's email address.

Figure 6.12 Multi-Tier Data Centers form.

The Facilities area shows the supply chain of facilities in the current system. If the facility you want to associate is not listed, you will have to add it. Entries listed in this area are added through the Add Facilities operation detailed in section 4 of this manual.

9. To associate a facility with a data center, click in the box corresponding to the facility you want to associate.



Facilities displayed in red are already managed by another data center. Each facility can be a part of only one data center.

10. After you select the facilities you want to associate, click the Save button to save your selections. A data center export file will be created and the current database will become the selected data center. A message window similar to the sample in Figure 6.13 is displayed when this process is complete.

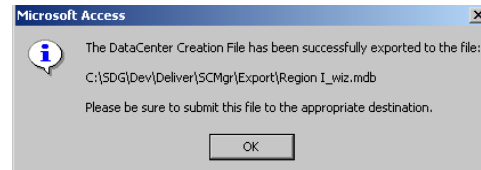


Figure 6.13 Wiz file creation message.

11. Click the OK button to close the message window.

The database is now a multi-tier data center.

### Importing Data Center Wizard Files

After you create the data center files (as explained in **Converting Database to Multi-tier Center**), you can import the files into the newly created multi-tier data center. From the System Maintenance menu, do the following:

1. Click the System Maintenance option, and then click the Multi-Tier Reporting Tools option in the Configuration menu.
2. Click the Data Center option. The Data Center Management form is displayed similar to Figure 6.14. This form shows you the data centers that have been identified as multi-tier data centers.
3. Click the data center to which you want to associate the newly created data center wizard file.

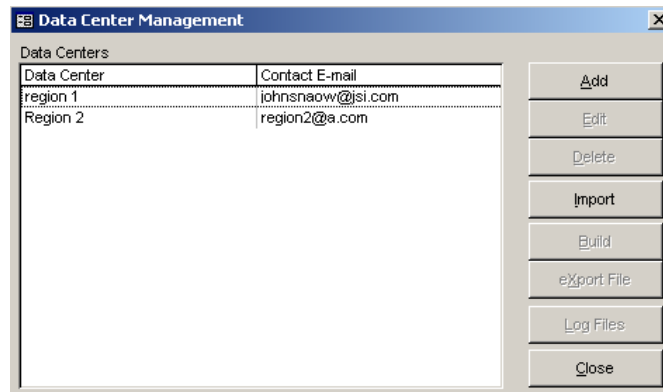


Figure 6.14 Sample Data Center Management form.

4. Click the Import button and select the data center wizard file you created.



Data center wizard files are identified by having wiz associated with their name (for example, datacenter-1\_wiz.mdb; datacenter-2\_wiz.mdb).

5. After you select the wizard file to create, Click the Import button. The data associated with the wizard file are imported and compared with any data that may exist in the multi-tier data center. If any inconsistencies exist in the data, the Adjustment Record Changed window, similar to the sample in Figure 6.15, is displayed.

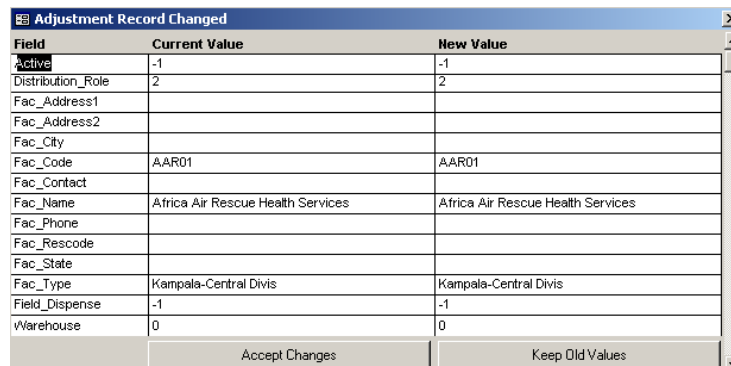


Figure 6.15 Sample Adjustment Record Changed window.



Values that do not match are highlighted (in yellow on the user's screen), as shown in sample Figure 6.14.

6. You have the option of accepting the new value or keeping the current value in the multi-tier database. Click the Accept Changes button to accept the new, imported values, or click the Keep Old Values button to retain the current database values. In either case, you will have to repeat this step for each questioned value.

During the import operation, a message box similar to the sample in Figure 6.16 may be displayed. This message box appears only if data for a particular facility/period combination already exist.

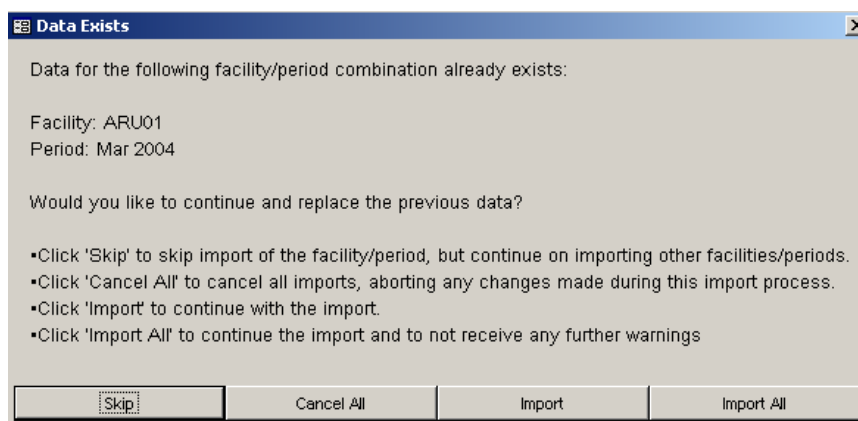


Figure 6.16 Data Exists message window.

You will have the following options available to you:

- Skip button. Does not import data of a particular facility or data period. Continues to next facility or data period.
  - Cancel All button. Cancels the import and undo the imported data files product tracking data records.
  - Import button. Continues the import of a particular record and asks again if another conflict is found.
  - Import All button. Continues with the import and will not ask if another conflict arises.
7. Click the option button that best suits your situation.
  8. After you complete the import operation, a message window similar to sample Figure 6.17 is displayed to let you know that the import operation was successfully completed. Click the OK button to close the message window.
  9. Repeat the import operation as many times as needed.



Figure 6.17 Successful import completion message.



10. When you finish importing the wizard files you need, click the Close button on the Import Datacenter File form to return to the Data Center Management form.
11. Click the Close button on the Data Center Management form to return to the Multi-Tier Reporting Tools menu.

# 7. Product Tracking

In the main menu, click the Product Tracking option. The Product Tracking Form (Figure 7.1) is displayed.

Product	Product Description	Opening Balance	Receipts	Issues	Dispensed	Adjustment Amount	Type	Close
ARTRI30FDC: Stavudine	ARTRI30FDC Stavudine30/Lamivudine	0	0	0	0	0		
ARTRI40FDC: Stavudine	ARTRI40FDC Stavudine40/Lamivudine	0	0	0	0	0		
ARCOMBIFDC: Zidovudine	ARCOMBIFDC Zidovudine/Lamivudine	0	0	0	0	0		
ARZIDOV300: Zidovudine	ARZIDOV300 Zidovudine (AZT) 300mg	0	0	0	0	0		
ARZIDOVSYR: Zidovudine	ARZIDOVSYR Zidovudine (AZT, ZDV) 1	0	0	0	0	0		
ARLAMIVSYR: Lamivudine	ARLAMIVSYR Lamivudine (3TC) 10mg	0	0	0	0	0		
ARSTAVUD30: Stavudine	ARSTAVUD30 Stavudine (D4T) 30mg	0	0	0	0	0		
ARSTAVUD40: Stavudine	ARSTAVUD40 Stavudine (D4T) 40mg	0	0	0	0	0		
ARDIDANO25: Didanosine	ARDIDANO25 Didanosine (DDI) 25mg	0	0	0	0	0		
ARDIDAN100: Didanosine	ARDIDAN100 Didanosine (DDI) 100mg	0	0	0	0	0		
ARDIDAN200: Didanosine	ARDIDAN200 Didanosine (DDI) 200mg	0	0	0	0	0		
ARNEVIR200: Nevirapine	ARNEVIR200 Nevirapine (NVP) 200mg	0	0	0	0	0		
ARNEVIRSYR: Nevirapine	ARNEVIRSYR Nevirapine (NVP) 10mg	0	0	0	0	0		
AREFAV1600: Efavirenz	AREFAV1600 Efavirenz (EFV) 600mg	0	0	0	0	0		
ARKALET133: Lopinavir	ARKALET133 Lopinavir/Ritonavir 133.3	0	0	0	0	0		
ARNELFI250: Nelfinavir	ARNELFI250 Nelfinavir (NFV) 250mg	0	0	0	0	0		

Figure 7.1 Product Tracking form.

## Adding Product-Tracking Records

Before you can add product-tracking records, you must select the facility to which all other facilities ultimately report. This facility is usually the central storage facility. In some distribution systems it may be a district-level warehouse or an SDP.

To add product-tracking records, follow these steps:

1. Click the arrow next to the Facility field, select a facility from the pull-down menu, and click the left mouse button.
2. Click the left or right arrow to the right of the Period field and select the reporting period listed on the facility's submitted report.

When you select a reporting period for the first time, a confirmation message (Figure 7.2) will be displayed, asking you to authorize the new period for data entry. This message will be displayed only for the first facility for which you are entering data for this period.

Figure 7.2 Initialize Period confirmation message.

3. Type the date that the report was received and press <Enter>.

The following fields apply to a particular health program for which you are collecting data on new, recurring, and pediatric cases.

4. Type the number of new cases and press <Enter>.
5. Type the number of recurring cases and press <Enter>.
6. Type the number of pediatric cases and press <Enter>.
7. Type the reported receipts and press <Enter>.



The Product Tracking Form does not have a Save button. Data are saved as you move from one field to the next.

The remaining fields in the Product Tracking Form apply to each product listed on the report submitted by the facility.

8. Click a product in the tree menu on the left. The Opening Balance field for that product will be selected for data entry.
9. Type the reported opening balance and press <Enter>.
10. Type the reported receipts and press <Enter>.

If the reporting facility is a warehouse only, the Issues column will be enabled and the Dispensed column will be disabled. If the reporting facility is an SDP, only the Dispensed column will be enabled. If the facility acts as both a warehouse and an SDP, both columns will be enabled.

11. For warehouses, type the reported issues and press <Enter>.
12. For SDPs, type the quantities dispensed to users and press <Enter>.

If you have enabled data collection on purpose of use, the Purpose of Use form (Figure 7.3) will be displayed.

Purpose of Use	
ARSTAVUD30: Stavudine (D4T) 30mg Capsules, 1	
VCT	0
PMTCT	0
Clinical Diagnosis	0
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Figure 7.3 Purpose of Use form.

13. Type the quantity dispensed for the first purpose of use listed and press <Enter>.
14. To record quantities dispensed for the other purposes of use listed, repeat step 13.
15. Click OK to return to the Product Tracking Form.
16. Type the reported adjustments (if any) and press <Enter>.

17. If there are reported adjustments, indicate the adjustment type.
18. Click the arrow to the right of the Adjustment Type pull-down box, select the adjustment type, click the left mouse button, and press <Enter>.
19. Type the closing balance, and press <Enter>. If you have enabled data collection on quantities on order, the Quantity on Order field will be enabled.
20. Type the quantity on order, and press <Enter>.

The AMC, Qty Required, and Qty Requested fields apply to facilities that act as SDPs.

21. Type the quantity required and press <Enter>.
22. Type the quantity requested and press <Enter>.

If you have enabled data collection on service statistics, the New Users and Continuing Users fields will be enabled, but the Continuing Users field will not be displayed.

23. Repeat steps 3–22 to add product-tracking records for additional products listed on the report submitted by the facility.

The Comments section (Figure 7.4) lets you record comments about data submitted on the report. Some comments are automatically added by Supply Chain Manager to note computer-generated adjustments.

First Input	ADMIN		Last Changed	ADMIN	
	28-Sep-05			03-Oct-05	

Figure 7.4 Comments section of Product Tracking form.

24. Click the Comment field and type any comments.
25. Repeat steps 1–24 to add product-tracking records for other facilities or reporting periods.

If antiretroviral therapy (ART) or tuberculosis (TB) has been selected on the System Configuration form during system maintenance (see **System Maintenance** for more information) the ART Patients or TB Treatments button will be displayed as shown in sample Figure 7.5. The button that is displayed depends on which option (ART or TB) was selected. If neither ART nor TB is selected, no button is displayed.

Figure 7.5  
Sample ART Patients and  
TB Treatments buttons.

26. With the ART Patients button displayed on the Product Tracking Form, click the ART Patients button.

The ART Usage form is displayed as shown in sample Figure 7.6.

27. Click the Total Adult Patients Currently on ART field, and type the number of adult patients on ART.

Figure 7.6 ART Usage form.

28. Click the Total Children Currently on ART field, and type the number of children on ART.
29. Click the Total of All Patients Currently on ART field, and type the total number of patients on ART.
30. Click the Close button to close the ART Usage form and save your entries.

31. With the TB Treatments button displayed on the Product Tracking form, click the TB Treatments button. The TB Treatments form is displayed (Figure 7.7).

Figure 7.7 TB Treatments form.

32. Click the New Cases field, and type the number of new cases being dealt with.
33. Click the Retreatment Cases field, and type the number of retreatment cases being administered.
34. Click the Pediatric Cases field, and type the number of children being treated for TB.
35. Click the Transfers In field, and type the number of transfer patients.
36. Click the Close button to close the TB Treatments form and save your entries.
37. Click Close when you have finished adding product-tracking records.

## Viewing Product-Tracking Records

The Product Tracking Form helps you find facilities with associated tracking records by looking up the facility's code or name. By default, facilities are listed by code. To find a facility by code, follow these directions:

1. Click the arrow next to the Facility (Code) field.
2. Select the facility you want from the pull-down menu.
3. Click the left mouse button.

To find a facility by name, follow these directions:

1. Click Facility (Code). As shown in sample Figure 7.8, the Facility (Code) tag becomes Facility (name), and a pull-down menu lists facilities listed by name.
2. Select the facility you want from the pull-down menu, and click the left mouse button.

Facility (name)	Facility (Code)
Aber District Hospital	ABE01
Adjumani Hospital	ADJ01
Anaka Hospital	ANA01
Angel Hospital	ANG01
Apac District Hospital	APC01
National Medical Stores	NMS
Pope Johns Hospital Aber	ABE02

Figure 7.8 Facility (Code) changed to Facility (name).

3. If the selected facility has a product-tracking record for the current reporting period, it is displayed and appears in a format similar to Figure 7.1. If the selected facility does not have a product-tracking record for the current reporting period, click the back arrow until a record is displayed.
4. Repeat steps 2 and 3 to view product-tracking records for additional facilities.
5. Click Close when you have finished viewing product-tracking records.

## Editing Product-Tracking Records

Edit product-tracking reports as follows:

1. Select the facility whose product tracking data you wish to edit.
2. Select a reporting period.
3. Click the field you wish to change, type your changes, and press <Enter>.
4. Repeat steps 1–3 to edit product-tracking records for additional facilities.
5. Click Close when you have finished editing product-tracking records.

### Validation Checks

When you modify a field on the Product Tracking Form, Supply Chain Manager performs a validation check and displays a message informing you of any validation errors. For most validation checks, Supply Chain Manager makes the appropriate adjustment when you select Yes or OK. The most common validation error messages are described below.

#### Opening Balance

If the opening balance you enter differs from the closing balance for the previous reporting period, an error message (Figure 7.9) appears:

1. Click Yes to keep the number you recorded.
2. Click No to use last month's closing balance.
3. Click Cancel to reenter the opening balance.

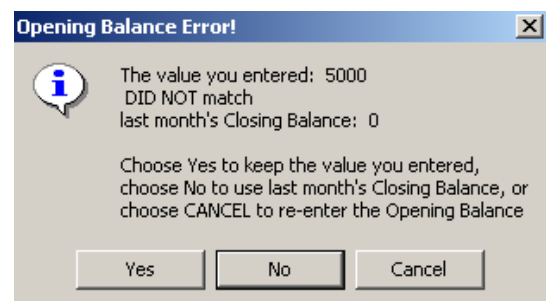


Figure 7.9 Opening Balance Error message.



The opening balance should always equal the closing balance reported during the previous reporting period.

### Dispensed by Purpose of Use

If the sum of quantities dispensed by the purpose of use you have entered does not match the total dispensed that was entered, an error message similar to that in Figure 7.10 is displayed.

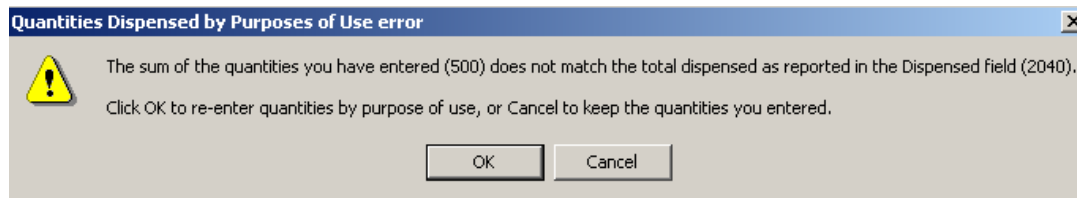


Figure 7.10 Quantities Dispensed by Purposes of Use error message.

### Closing Balance

If the closing balance you recorded does not match the calculated number, an error message (Figure 7.11) appears.

1. Click OK to keep the number you recorded and let Supply Chain Manager generate an adjustment. Supply Chain Manager adds a note to the Comment field regarding the date and time the adjustment was made (Figure 7.12).
2. Click Cancel to reenter the closing balance.

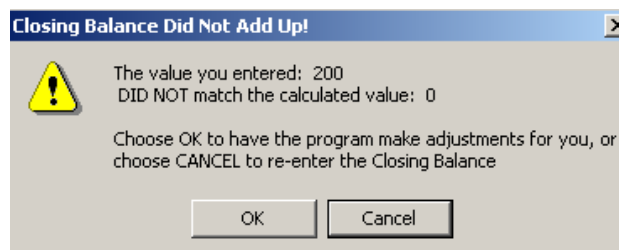


Figure 7.11 Closing balance error message.

Computer Generated Adjustment of: 0  
on 10-17-2005 at 22:08:11 for Stavudine30/Lamivudine/Neurapine  
(DATE/TIME/AMOUNT) 30/450/200mg Tablets

Figure 7.12 Computer-generated adjustment comment.



The closing balance recorded in Supply Chain Manager must equal the facility's reported closing balance. Do not change the reported closing balance.

### Average Monthly Consumption

The average monthly consumption for each product is calculated by dividing the total quantity dispensed to users by the number of periods to use for average calculation (see **System Configuration** for more information). If the number you recorded does not match the calculated number, an error message appears (Figure 7.13).

1. Click Yes to keep the number you recorded.
2. Click No to use the calculated number.

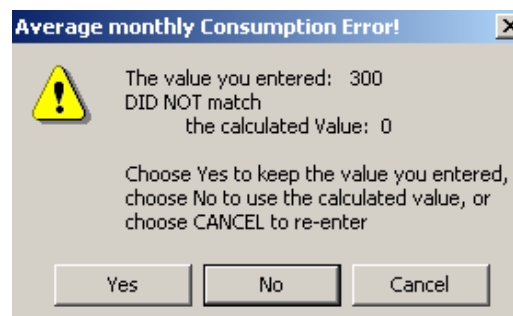


Figure 7.13 Average Monthly Consumption Error message.

3. Click Cancel to reenter the average monthly consumption.



When a facility is overstocked (above maximum), a negative number appears in the Quantity Required field.

### Quantity Required

The quantity required is calculated by multiplying average monthly consumption by the maximum months of supply and subtracting the closing balance from the result. If the number you recorded does not match the calculated number, an error message (Figure 7.14) appears.

1. Click Yes to keep the number you recorded.
2. Click No to use the calculated value.
3. Click Cancel to reenter the quantity required.

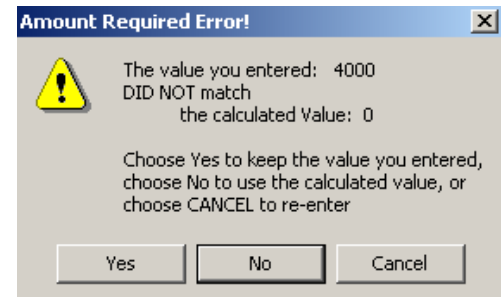


Figure 7.14 Quantity Required Error message.

### Quantity Issued

The quantity issued is the amount the facility has received. This amount cannot be a negative number. If you enter a negative number, an error message (Figure 7.15) appears.

Click OK and enter a positive number or zero.

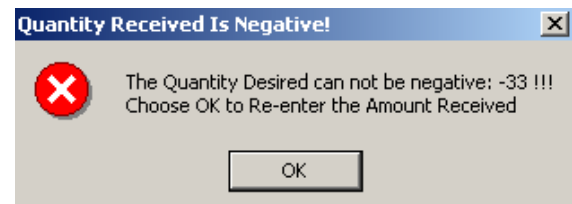


Figure 7.15 Quantity issued error message.

## Printing the Selected Product-Tracking Record

To print the selected product-tracking report, follow these steps:


1. Click Print.
2. Click Close when you finish printing the product-tracking record.

## Exporting Product-Tracking Records

You can export product-tracking records to a text or XML file for import into other logistics management software such as PipeLine:

1. In the main menu, click the Utilities option.
2. In the Utilities menu, click the Export Consumption Data option. The Export Consumption Data form (Figure 7.16) is displayed.



3. In the Export Periods area, click the arrow to the right of the From pull-down box, click a starting period, and click the left mouse button.
4. Click the arrow to the right of the To pull-down box, click an ending period, and click the left mouse button.
5. In the Products window, click one or more boxes to the left of the categories and products in order to include them in the export file.
6. In the Export area, click XML or Text file format.
7. Click the ellipsis  to the right of the File field. The Save export File as form (Figure 7.17) appears.
8. Enter a file name in the File name text box.
9. To change the location of the export file, click the Save as type pull-down box and select another directory.
10. Click Save. The Export Consumption Data form will again be visible.
11. Click Export.

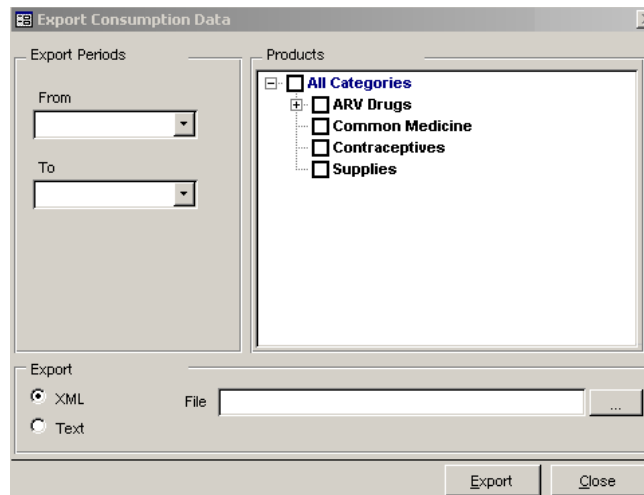


Figure 7.16 Export Consumption Data form

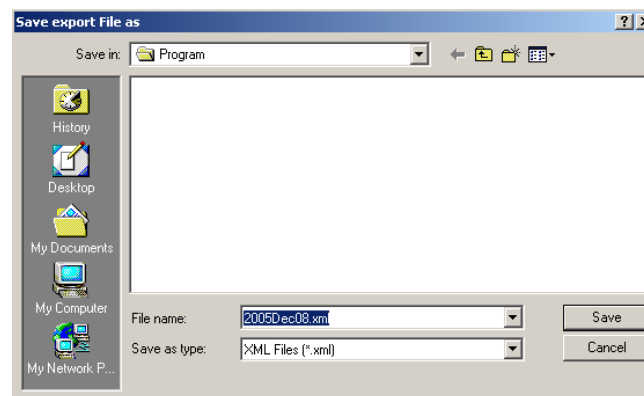


Figure 7.17 Save export File as form.

If the data are successfully exported, a confirmation message similar to Figure 7.18 will appear.

If you did not specify a directory in the Save export File as form, the file will be saved to the default Supply Chain Manager directory.

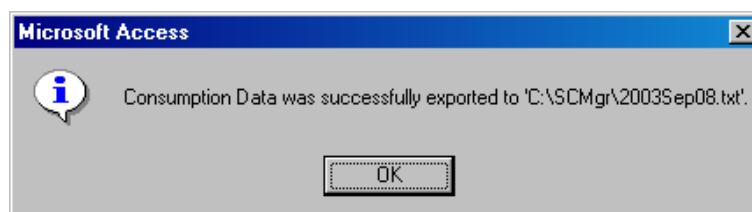


Figure 7.18 Export complete message.

The export file will contain the following data about each product within the export period specified:

- Product code
- Aggregated consumption at service delivery points (quantities dispensed to users)
- Aggregated adjustments at all distribution levels.



# 8. Distribution Resource Planning

In the main menu, click the **DRP** option.

The **DRP** option will be visible only if the **DRP** module is checked in the **System Configuration** form. (See **System Configuration** for more information.)

## Facility Stock Counts

The **DRP Stock Count** form lets you record stock levels at each facility. Reported stock levels are used to estimate current stock balances.

Click the **Facility Stock Count** option. The **DRP Stock Count** form (Figure 8.1) is displayed.

Product ID	Product	Category	Stock level
01029	Cotrimaxazole tablet 480mg	Antibiotics and Antimicrobial	0
02082	Nevirapine (NVP) suspension 50mg/ml, 240ml	Antiretrovirals	0
25151	HIV test kits: Determine HIV 1/2	Laboratory Stains, Reagents	0
13055	Phenytoin sodium tablet 100mg	Medicines Acting on Central	0
17991	BCG vaccine injection 20 dose vial	Vaccines and Sera	0
17137	Poliomyelitis vaccine, live oral susp. 20 dose dis	Vaccines and Sera	0

Figure 8.1 DRP Stock Count form.

## Adding Stock Counts

To add stock counts, follow these steps:

1. Click the arrow next to the **Find Facility** field, select a facility from the pull-down menu, and click the left mouse button.
2. Click the **On Date** field and type the date that the stock level was collected.
3. Click **Add New** button. A confirmation message (Figure 8.2) is displayed, asking you to confirm the new record.

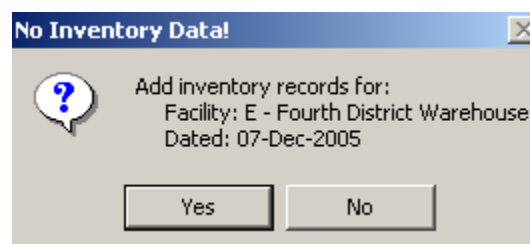


Figure 8.2 Confirmation message.

4. Click Yes to add a stock count record. A DRP stock count record (Figure 8.3) is created for the facility, listing products distributed by the selected facility.
5. Click the arrow next to the Completed By field, select from the pull-down menu the name of the person who reported the stock count, and click the left mouse button.

**DRP Stock Count**

B: First District Warehouse  
September 20, 2003

Find Facility: First District Warehouse  
on Date: 20-Sep-03  
Completed By: [Pull-down menu]

Add New

Note: [Text area]

Product ID	Product	Category	Stock level	
01029	Cotrimaxazole tablet 480mg	Antibiotics and Antimicrobial	0	[Note icon]
02082	Nevirapine (NVp) suspension 50mg/ml, 240ml	Antiretrovirals	0	[Note icon]
25151	HIV test kits: Determine HIV 1/2	Laboratory Stains, Reagents	0	[Note icon]
13055	Phenytoin sodium tablet 100mg	Medicines Acting on Central	0	[Note icon]
17991	BCG vaccine injection 20 dose vial	Vaccines and Sera	0	[Note icon]

Add Product(s) Delete Product(s) Delete Form Change Date Close

Figure 8.3 Blank DRP Stock Count form.

6. Click the Note field and type a note for the stock count record if applicable.
7. For each product reported, click the Stock level field and type the reported stock level.

You can enter notes on any product by clicking the note icon to the right of the Stock level field.

8. Click the Note icon to the right of the Stock level field to open the Note window for the selected product. The Note window (Figure 8.4) is displayed.

**Note**

Product Code: 01029 Product: Cotrimaxazole tablet 480mg

Note: [Text area]

OK Cancel

Figure 8.4 Note window.

9. Type a note and click OK or close the Note window to return to the DRP Stock Count form.
10. Click Cancel to close the Note window without adding notes.

### Adding Products to Facility Stock Counts

Products can be added to facility stock counts as follows:

1. Click the Add Product(s) button. The Product Filter window (Figure 8.5) is displayed, listing all products in Supply Chain Manager.
2. Click one or more products to add.
3. Click OK to close the Product Filter window.
4. Click Cancel to close the window without adding products.

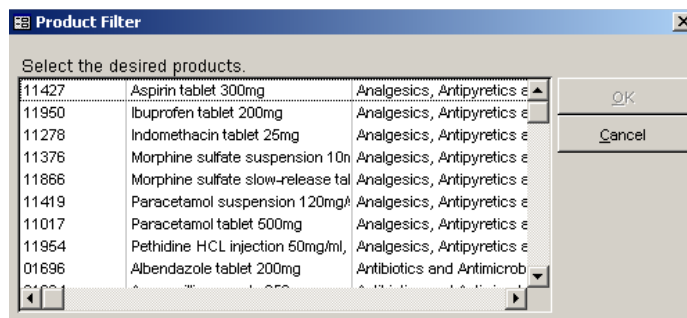


Figure 8.5 Product Filter window.

The selected products appears on the stock count form.

### Deleting Products from Facility Stock Counts

Products can be deleted from the stock count of the selected facility as follows:

1. Click Delete Product(s). The Product Filter window (Figure 8.5) is displayed, listing all products distributed by the facility's type.
2. Click one or more products you wish to delete.
3. Click OK to delete the selected products.
4. Click Close to return to the DRP Stock Count record.

### Viewing Facility Stock Counts

There are three methods of viewing facility stock counts. To use method 1, follow these steps:

1. Click the arrow next to the Find Facility field.
2. Select a facility from the pull-down menu.
3. Click the left mouse button to display the current stock count record for that facility.

To use method 2, follow these steps:

1. Click the arrow next to the on Date field.
2. Select a date from the pull-down menu.
3. Click the left mouse button to display the stock count record for the selected facility.

To use method 3, follow these steps:

1. Click the arrow next to the Find Facility field, select a facility from the pull-down menu, and click the left mouse button.
2. Click the arrow next to the on Date field, select a date from the pull-down menu, and click the left mouse button.

The facility's stock count on the selected date is displayed.



If the facility has more products than can be displayed on the screen, click the vertical scroll bar to view additional products.

### *Editing Facility Stock Counts*

To edit facility stock counts, do the following:

1. Select the stock count record you wish to edit.
2. Click the field you wish to change and type your changes.
3. Click Close when you have finished editing the stock count record.

### *Editing Stock Count Dates*

To edit stock count dates, follow these steps:

1. Click Change Date. The New Date form (Figure 8.6) is displayed.
2. Type a date and click OK.

Figure 8.6 New Date form.

### *Deleting Facility Stock Counts*

To delete facility stock counts, follow these steps:

1. Click Delete. A confirmation message (Figure 8.7) is displayed, asking you to confirm to delete.
2. Click Yes to delete the selected record.
3. Click No to cancel.

Figure 8.7 Delete confirmation message.

## Delivery Personnel

In the DRP menu, click the Personnel option. The Personnel form (Figure 8.8) is displayed.

### *Adding Delivery Personnel*

To add delivery personnel, follow these steps:

1. Click Add. A blank Personnel form (Figure 8.9) is displayed.
2. Type the delivery person's last name and press <Enter>.
3. Type the delivery person's first name.
4. Click Save.
5. Repeat steps 2–4 to add more delivery personnel.
6. Click Close when you have finished adding personnel.

Figure 8.8 Personnel form.

Figure 8.9 Blank Personnel form.

### *Viewing Delivery Personnel*

Two methods are used to view delivery personnel. To use method 1, follow these steps:

1. Click the arrow next to the Find field, select a delivery person from the pull-down menu, and click the left mouse button to display the delivery person's first and last name.
2. Click Close when you have finished viewing delivery personnel.

To use method 2, follow these steps:

1. Click Next to display the next delivery person.
2. Click Previous to display a previously displayed delivery person.
3. Click Close when you have finished viewing delivery personnel.



### *Editing Delivery Personnel*

To edit delivery personnel, follow these steps:

1. Select the delivery person whose name you wish to edit.
2. Click Edit.
3. Click the Name field you wish to edit, and type your changes.
4. Click Save.
5. Repeat steps 1–4 to edit additional delivery personnel.
6. Click Close when you have finished editing delivery personnel.

### *Deleting Delivery Personnel*

To delete delivery personnel, follow these steps:

1. Select the delivery person you wish to delete.
2. Click Delete. A confirmation message (Figure 8.10) is displayed, asking you to confirm the deletion.
3. Click Yes to delete the selected delivery person.
4. Repeat steps 1–3 to delete additional delivery personnel.
5. Click Close when you have finished deleting personnel.

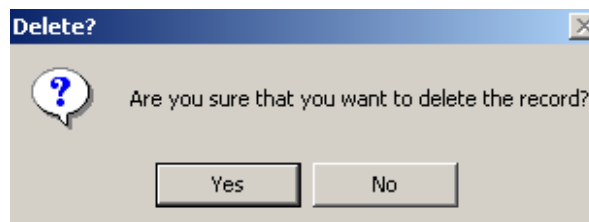


Figure 8.10 Delete confirmation message.

### *Printing the Selected Delivery Person*

To print a record, follow these steps:

1. Select the delivery person whose record you wish to print.
2. Click Print to create a report for the selected person.
3. Click Close when you have finished printing delivery personnel records.

## Delivery Vehicles

In the DRP menu, click the Vehicles option. The Delivery Vehicles form (Figure 8.11) is displayed.

The screenshot shows the 'Delivery Vehicles' form with the following data:

Vehicle Information	
Truck:	Truck_1
Make:	Honda
Model:	Van
Year:	1998

Capacities		Deliveries	
Max. Load:	10,000.00	lbs	
Height:	8.00	ft.	
Length:	20.00	ft.	
Width:	4.00	ft.	
Volume:	640.00	cu. ft.	

Buttons at the bottom: Add, Edit, Previous, Next, Print, Delete, Close.

Figure 8.11 Delivery Vehicles form.

### Adding Delivery Vehicles

To add delivery vehicles, follow these steps:

1. Click Add. A blank Delivery Vehicles form (Figure 8.12) is displayed.

The screenshot shows the blank 'Delivery Vehicles' form with the following fields:

Vehicle Information	
Vehicle	
Make	
Model	
Year	0

Capacities		Deliveries	
Max. Load	0.00	lbs	
Height	0.00	ft.	
Length	0.00	ft.	
Width	0.00	ft.	
Volume		cu. ft.	

Buttons at the bottom: Save, Cancel.

Figure 8.12 Blank Delivery Vehicles form.

2. The Truck field lets you enter a brief description of the delivery vehicle (example: Half-ton pickup). Type a brief description of the delivery vehicle and press <Enter>.

3. Type the vehicle's manufacturer (example: Toyota) and press <Enter>.
4. Type the vehicle's model (example: Hilux) and press <Enter>.
5. Type the four-digit year the vehicle was made.
6. Click the Max. Load field, type the maximum load the vehicle can carry, and press <Enter>.

The following fields apply to the size of the vehicle's cargo area and not to the size of the vehicle itself.

7. Type the cargo area's height and press <Enter>.
8. Type the cargo area's length and press <Enter>.
9. Type the cargo area's width and press <Enter>.

The system calculates the cargo area's volume and displays the calculated value in the Volume field.

10. Click Save.
11. Repeat steps 1–10 to add more delivery vehicles.
12. Click Close when you have finished adding delivery vehicles.

### *Viewing Delivery Vehicles*

Two methods are used to view delivery vehicles. To use method 1, follow these steps:

1. Click the arrow next to the Find field, select a vehicle from the pull-down menu, and click the left mouse button.
2. Click the Deliveries tab to view delivery routes the vehicle has completed or is scheduled to make.
3. Click Close when you have finished viewing delivery vehicles.

To use method 2, follow these steps:

1. Click Next to display the next vehicle.
2. Click Previous to display the previously displayed vehicle.
3. Click the Deliveries tab to view delivery routes the vehicle has completed or is scheduled to make.
4. Click Close when you have finished viewing delivery vehicles.

## Editing Delivery Vehicles

To edit delivery vehicles, follow these steps:

1. Select the delivery vehicle you wish to edit.
2. Click Edit.
3. Click the field you wish to change and type your changes.
4. Click Save.
5. Click Close when you have finished editing delivery vehicles.

## Deleting Delivery Vehicles

To delete delivery vehicles, follow these steps:

1. Select the delivery vehicle you wish to delete.
2. Click Delete. A confirmation message (Figure 8.13) is displayed, asking you to confirm the deletion.
3. Click Yes to delete the record.

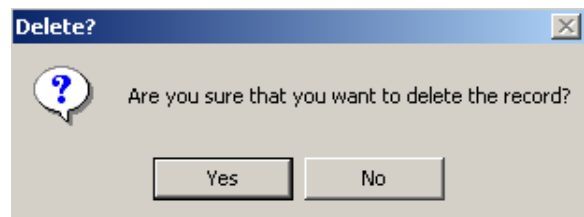


Figure 8.13 Delete confirmation message.

4. Repeat steps 1–3 to delete additional delivery vehicles.
5. Click Close when you have finished deleting delivery vehicles.

## Printing the Selected Delivery Vehicle

Click Print to create a report for the selected vehicle.

## Delivery Routes

1. In the DRP menu, click the Delivery Routes option. The Routes form (Figure 8.14) is displayed.

Figure 8.14 Routes form.

## Adding Delivery Routes

To add delivery routes, do the following:

1. Click Add. A blank Routes form (Figure 8.15) is displayed.
2. Type a unique code and press <Enter>.
3. Type a description for the route.
4. In the Available area, click the facility or facilities you wish to assign to the route. Select multiple facilities by pressing the <Ctrl> or <Shift> key while clicking on each facility.
5. After selecting all facilities to be assigned to the route, click the right arrow to move the facilities to the Selected window. A Route Stops form (Figure 8.16) is displayed for each facility you selected.
6. For each facility, click the Distance from previous Stop field, and enter the distance to this stop from the previous one.
7. Click the Hours from previous Stop field, and enter the amount of time (in hours) it takes to drive from this stop to the previous one.
8. Click the Distance from Supplier field, and type the distance from the facility to its supplier.
9. Click the Hours from Supplier field, and type the amount of time (in hours) it takes to drive from the facility to its supplier.
10. Click OK to return to the delivery route record.
11. Repeat steps 1–7 to assign additional facilities to the route.
12. Click Save.
13. Click Close when you have finished adding delivery routes.

Figure 8.15 Blank Routes form.

Figure 8.16 Route Stops form.

You can change the position of facilities in the Selected window of the Stops tab as follows:

1. Select the facility you wish to move.
2. Click the up arrow or down arrow to change the facility's position in the route.
3. Click Save.

### *Viewing Delivery Routes*

There are two methods for viewing delivery routes. To use method 1, follow these steps:

1. Click the arrow next to the Find field, select a route from the pull-down menu, and click the left mouse button.
2. Click the Deliveries tab to view scheduled and completed deliveries for the selected delivery route.
3. Click Close when you have finished viewing delivery routes.

To use method 2, follow these steps:

1. Click Next to display the next route.
2. Click Previous to display a previously displayed route.
3. Click the Deliveries tab to view scheduled and completed deliveries for the selected delivery route.
4. Click Close when you have finished viewing delivery routes.

### *Editing Delivery Routes*

Edit delivery routes as follows:

1. Select the route you wish to edit.
2. Click Edit.
3. Click the field you wish to change and type your changes.
4. To add a facility to the route, do the following: In the Available window, click the facility you wish to add to the route. Click the right arrow to move the facility to the Selected window.
5. To remove a facility from the route, do the following: In the Selected window, click the facility you wish to remove from the route. Click the left arrow to move the facility to the Available window.

To change the position of facilities in the Selected window of the Stops tab, follow these steps:

1. In the Selected window, click the facility whose position you wish to change. Click the up arrow or down arrow to change its position.
2. Click Save.
3. Click Close when you have finished editing delivery routes.

### *Deleting Delivery Routes*

To delete delivery routes, follow these steps:

1. Select the delivery route you wish to delete.
2. Click Delete. A confirmation message (Figure 8.17) is displayed, asking you to confirm the deletion.
3. Click Yes to delete the selected record.
4. Repeat steps 1–3 to delete additional delivery routes.
5. Click Close when you have finished deleting delivery routes.

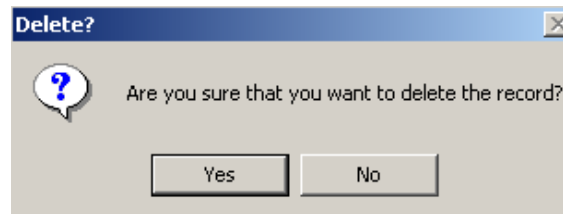


Figure 8.17 Delete confirmation message.

### *Printing the Selected Delivery Route*

To print the selected delivery route, follow these steps:

1. Select the delivery route you wish to print.
2. Click Print to create a report for the selected delivery route. After the report is created, its first page is displayed.
3. Click Print to print the report.
4. Click Close on the Print Menu to return to the Delivery Routes form.
5. Click Close when you have finished printing delivery routes.

## **Delivery Planning**

The Delivery Planning option lets you assign drivers and vehicles to delivery routes. This option also lets you schedule deliveries and then assign vehicles and personnel to them.

In the DRP menu, click the Delivery Planning option. The Delivery Planning form (Figure 8.18) is displayed.

Facility Name	Route	Delivery	Min Date	Level
Second District Warehouse	ROUTI	YES	16-Oct-13	----
First District Warehouse	ROUTI	YES	16-Oct-13	----
Fourth District Warehouse	ROUTI		16-Oct-13	----
Third District Warehouse	ROUTI		16-Oct-13	----

Figure 8.18 Delivery Planning form.

### Adding Deliveries

To add deliveries, follow these steps:

1. Click the arrow next to the Go to field, select New Delivery from the pull-down menu, and click the left mouse button.

Facility Name	Route	Delivery	Min Date	Level
Second District Warehouse	ROUTI	YES	16-Oct-13	----
First District Warehouse	ROUTI	YES	16-Oct-13	----
Fourth District Warehouse	ROUTI		16-Oct-13	----
Third District Warehouse	ROUTI		16-Oct-13	----

Figure 8.19 Facilities in Need list.

Facilities within the distribution network are displayed in the Facilities in Need window (Figure 8.19). These facilities are listed by need. You can change the sort order as follows:

2. Click the Name option in the Sort by field to sort by name.
3. Click the Route option in the Sort by field to sort by route.
4. Before you plan a delivery, you must select a vehicle for the delivery. Click the arrow next to the Vehicle field, select a vehicle from the pull-down menu, and click the left mouse button.



- After you select a vehicle, you can select the facilities to which it will distribute products. Double-click a facility in the Facilities in Need window. The Needed Products form (Figure 8.20) is displayed.

Product	Balance On 30-Jun-03	Estimated Balance	AVG. Monthly Consumption	Months of Stock	Needed	Desired	Volume (cu. ft.)
01029 Cotrimaxazole tablet 480m	0	74	32	2.31	1000	1000	0.00
02082 Nevirapine (NVP) suspen	0	133	58	2.29	1000	1000	0.00
13055 Phenytoin sodium tablet 1	0	46	20	2.30	200	200	0.00
17991 BCG vaccine injection 20	0	74	32	2.31	200	200	0.00
25151 HIV test kits: Determine HI	0	41	18	2.28	200	200	0.00

Figure 8.20 Needed Products form.

- Click the Inventory checkbox if a physical inventory must be taken when products are delivered.

### Determining Need

Need is usually determined by Supply Chain Manager on the basis of data recorded in the Product Tracking Form (see **Adding Product-Tracking Records** for more information). From within the Deliveries form, you can view the lists of reports used for calculating need as well as a list of missing reports.

- Click Reports Used to view the list of reports that were used to calculate the selected facility's need. The Reports Used in Calculation window (Figure 8.21) is displayed.
- Click OK to close the window.
- The Missing Reports button shows the reports that were not available for calculating need. If reporting is complete, this window should not display any reports. Click Missing Reports to display the reports not available for calculating need. The Missing Reports window (Figure 8.22) is displayed. If missing reports are listed, try to acquire the reports and record them in the Product Tracking Form. Complete reporting will help ensure that the facilities are stocked according to plan.
- Click OK to close the window.

Figure 8.21 Reports Used in Calculation window.

Figure 8.22 Missing Reports window.

### Changing Desired Quantities

You can change quantities of products to be delivered by changing the values in the Desired column:

1. Double-click the quantity you wish to change and type your changes.
2. Repeat step 1 to edit the desired quantities for additional products.
3. Click OK when you are finished changing desired quantities.

Selected	
Facility Name	Route
First District Warehouse	ROUTE1
Second District Warehouse	ROUTE2

Figure 8.23 Selected facilities window.

The facility is moved to the Selected window (Figure 8.23) and the percentage of the vehicle's occupied cargo space is displayed in the Load field.

### Auto-Filling

The auto-fill feature lets you plan a delivery route based on established delivery routes by selecting one facility and letting the DRP Module select the rest. The module selects all facilities on the same route as the facility you just selected.

This method may overload the selected vehicle. If that happens, click the arrow next to the Vehicle field, select a larger vehicle (if one is available) from the pull-down menu, and click the left mouse button.

### Confirming Deliveries

After you add a delivery, you can confirm it as follows:

1. Click Confirm. A confirmation window (Figure 8.24) is displayed, asking you to confirm the delivery.
2. Click Yes to confirm the delivery. The Shipping Reports form (Figure 8.25) is displayed.
3. Click the checkbox to the left of each shipping report you wish to print.
4. Click Preview to preview the reports before printing.
5. Click Print to print the reports without previewing.



Figure 8.24 Confirm delivery window.

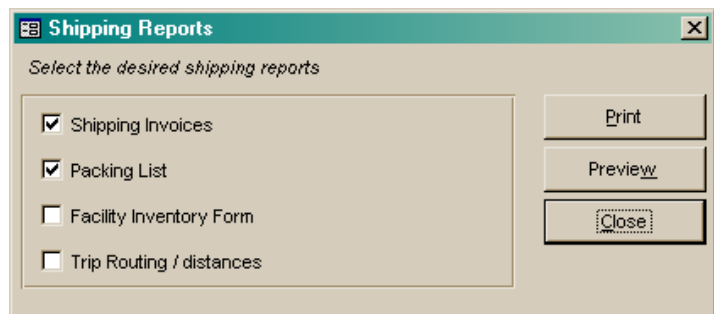


Figure 8.25 Shipping Reports form.

## Viewing Deliveries

There are three methods for viewing deliveries. To use method 1, follow these steps:

1. Click the arrow to the right of the Go to field, select a route from the pull-down menu, and click the left mouse button.
2. Repeat step 1 to view additional deliveries.
3. Click Close when you have finished viewing deliveries.

To use method 2, follow these steps:

1. Click the arrow next to the Find field, select a route from the pull-down menu, and click the left mouse button to display the selected route.
2. Click Close when you have finished viewing deliveries.

To use method 3, follow these steps:

1. Click Next to display the next record.
2. Click Previous to display the previously displayed record.
3. Click Close when you finish viewing deliveries.

## Printing the Selected Delivery

To print the selected delivery, follow these steps:

1. Select the delivery you wish to print.
2. Click Print. The Shipping Reports form (Figure 8.25) is displayed.
3. Click the reports you wish to preview or print.

## Previewing Shipment Reports

Use the Preview button to preview each report before you print it:


1. Click Preview. A preview window for each selected shipping report is displayed. The windows are layered and may appear as one window.
2. Click Minimize  to reduce the size of each window. Each preview window is reduced and placed near the bottom of the screen (Figure 8.26).



Figure 8.26 Minimized shipping reports.


3. Click Maximize  to review each report. The expanded preview window shows the first page of the report. This page may contain more data than your screen can display at one time.
4. Use the vertical scroll bar to view the page from top to bottom.
5. Use the horizontal scroll bar to view the page from left to right.
6. Use the navigation bar (Figure 8.27) to view reports with multiple pages, one page at a time.



Figure 8.27 Navigation bar.



See section 3, **Getting Started**, for more information on the scroll and navigation bars.

7. Click Print to print the report.
8. Click Close.

### Printing Shipment Reports without Previewing

To print shipment reports without previewing them, follow these steps:

1. Select the delivery planning record you wish to print.
2. Click Print to display the Shipping Reports form.
3. Click the checkbox to the left of each report you wish to print.
4. Click Print to print the reports.
5. Click Close when you have finished printing reports.

### Editing Deliveries

To edit the deliveries, follow these steps:

1. Select the delivery you wish to edit.
2. Click Edit.

### Assigning Delivery Personnel

To assign delivery personnel, do the following:

1. Click the Personnel tab. Available delivery personnel are displayed in the Personnel window (Figure 8.28).

Available
Bailey , Larry
Lyons , Laurie
Rock , Leslie

Figure 8.28 Available delivery personnel list.

2. Click the name of the person you wish to assign to the selected delivery.
3. Click Add to move the person to the Selected window.
4. Click Save.

### Setting Delivery Dates

Follow these steps when setting delivery dates:

1. Select the delivery you wish to schedule.
2. Click Edit.
3. Type the start date in the Est. Date field.
4. Click Save.

### Completing Deliveries

After a delivery has been completed, follow these steps:

1. Select the delivery that was completed.
2. Click Edit.
3. Click the Completed checkbox.
4. Click Save.

### Deleting Deliveries

You can delete deliveries as follows:

1. Select the delivery you wish to delete.
2. Click Delete. A confirmation message (Figure 8.29) is displayed, asking you to confirm the deletion.
3. Click Yes to delete the selected record.
4. Repeat steps 1–3 to delete additional deliveries.
5. Click Close when you have finished deleting deliveries.

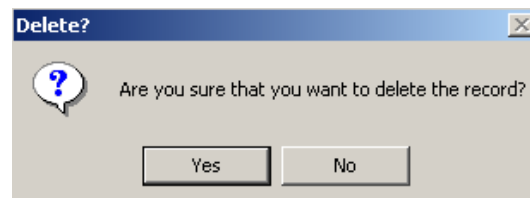


Figure 8.29 Delete confirmation message.

# 9. Reports

Supply Chain Manager generates a range of reports using data entered in the Product Tracking module. These reports are grouped as follows:

- **Administrative.** These reports help logistics managers track facilities that have or have not submitted reports. They provide information for monitoring and evaluation.
- **Graphs.** These reports present data in a graphical form, allowing logistics managers to discern patterns of stock levels and use over time.
- **Logistics.** These reports provide information to support logistics decision making.



Some of Supply Chain Manager's reports were designed for specific country needs and may not be available to all users. In addition, some reports will only become available when related options are selected on the System Configuration form.

Many of the reports may be filtered to display data for selected product categories only. This feature may be useful to managers of vertical programs who want to review data for only those products included in their programs, even though the products are distributed through an integrated supply chain.

See **Product-Tracking Reports** for a brief explanation of the reports under each report group.

## Viewing Reports

1. In the main menu, click the Reports option. The Report Manager form (Figure 9.1) is displayed.
2. Click a report tab and click the report you wish to view.
3. The Period field lets you select the report period. Click the arrow next to the Period field, select a period from the pull-down menu, and click the left mouse button.
4. The User-Defined option of the Period pull-down menu lets you specify a date range for the report. Select the User-Defined option from the Period pull-down menu.

The screenshot shows the 'Report Manager' window. At the top, there are three tabs: 'Admin', 'Graphs', and 'Logistics'. The 'Logistics' tab is currently selected. Below the tabs is a list of reports: 'Adjustments Summary', 'Aggregate Stock Movement - by Level', 'Aggregate Stock Movement Report', 'Below Emergency Order Point', 'CYP Report', 'Data Entry Error Report', 'Dispensed To User Report', and 'Facility Dispensed To User Report'. Below the list is a section titled 'Report Parameters'. It contains several fields: 'Period' (set to '3rd Quarter'), 'Year' (set to '2003'), 'Category', 'Product', 'Type', and 'Facility'. There are also buttons for 'Close' and 'Default', and a checkbox for 'Allow Continuous Printing'.

Figure 9.1 Report Manager form.

The User-defined date range window (Figure 9.2) is displayed so you can enter the starting and ending periods.

5. In the From area, click the arrow next to the month field, select a month from the pull-down menu, and click the left mouse button.
6. Click the arrow next to the year field, select a year from the pull-down menu, and click the left mouse button.
7. In the To area, click the arrow next to the month field, select a month from the pull-down menu, and click the left mouse button.
8. Click the arrow next to the year field, select a year from the pull-down menu, and click the left mouse button.
9. Click OK to return to the Report Manager.

Figure 9.2 User-defined date range form.

When the Report Manager form is displayed, create the report as follows:

1. Click the arrow next to the Year field, select a year from the pull-down menu, and click the left mouse button.
2. Click the arrow next to the Category field (if active), select a category from the pull-down menu, and click the left mouse button.
3. Click the arrow next to the Product field (if active), select a product from the pull-down menu, and click the left mouse button.
4. Click the arrow next to the Facility Type field (if active), select a facility type from the pull-down menu, and click the left mouse button.
5. Click the arrow next to the [Supplying] Facility field (if active), select a facility from the pull-down menu, and click the left mouse button.

The Reporting Group field lets you compile report data based on a reporting group that you define.

1. Click the arrow next to the Reporting Group field (if active), select a reporting group from the pull-down menu, and click the left mouse button.
2. Click the Preview button to view the report.

## Product-Tracking Reports

The following reports are grouped by the tabs on which they appear. Each report allows for the addition of comments, if needed.

### *Administrative Reports*

Administrative reports consist of the facility listing, mailing labels, and nonreporting facilities reports.

#### **Facility Listing**

This report displays a list of all the facilities in Supply Chain Manager.

The Facility Listing can be generated with the following parameters:

- Facility Type. A selected facility type or a facility type group incorporating several facility types
- Reporting Group. A selected reporting group based on the reporting groups that you defined.

#### **Mailing Labels**

This report generates mailing labels displaying the contact person and address for each facility in the distribution system. Logistics managers may use these labels when sending reports or correspondence to facilities in the distribution system.

Mailing labels can be generated with the following parameters:

- Facility Type. A selected facility type or a facility type group incorporating several facility types
- Reporting Group. A selected reporting group based on the reporting groups you defined.

#### **Nonreporting Facilities**

This report lists facilities whose reports have not been received or recorded in Supply Chain Manager for the selected reporting period. Logistics managers may use this report to determine reporting compliance and to monitor the status of report processing.

Nonreporting Facilities can be generated with the following parameters:

- Period. Month, quarter, first half, second half, or year
- Facility Type. A selected facility type or a facility type group incorporating several facility types
- Reporting Group. A selected reporting group based on the reporting groups you defined.

### *Graphic Reports*

Several types of graphic reports can be created.



### Average Stock Levels

This graph displays trends in the months of stock over the selected period of time. It divides the closing balance at all facilities by the calculated average monthly consumption. The resulting months of stock are displayed by month.

The Average Stock Level graph can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Facility Type.* Selected facility
- *Supplying Facility.* Selected supplier and all the facilities it supplies.

### Couple-Years of Protection



The Couple-Years of Protection (CYP) graph and report apply only to products for which you have recorded a CYP factor. (See **Background Data** for more information.)

This graph displays trends in the couple-years of protection (CYPs) over the selected period of time. For each product, it divides total consumption by the CYP factor for each product. CYP values are then displayed by month.

The CYP graph can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Facility Type.* Selected facility
- *Supplying Facility.* Selected supplier and all the facilities it supplies
- *Reporting Group.* A selected reporting group based on the reporting groups you defined.

### Dispensed to Users

This graph shows trends in quantities dispensed to users over the selected period of time. For each product category or product selected, quantities dispensed to users are displayed by month.

The Dispensed to Users graph can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Facility Type.* Selected facility
- *Supplying Facility.* Selected supplier and all the facilities it supplies
- *Reporting Group.* A selected reporting group based on the reporting groups you defined.

### ART Scale-Up Line Graph

This line graph shows antiretroviral therapy (ART) over the specified date range. Three datasets are displayed: Adult Treatments, Child Treatments, and Total (Adult + Child) Treatments.

The ART Scale-Up Line Graph can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Facility Type.* Selected facility
- *Facility.* Selected supplier and all the facilities it supplies
- *Reporting Group.* A selected reporting group based on the reporting groups that you defined.

### ART Scale-Up Total

This bar graph shows the total ART treatments over the specified date range.

The ART Scale-Up Total graph can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Facility Type.* Selected facility
- *Facility.* Selected supplier and all the facilities it supplies
- *Reporting Group.* A selected reporting group based on the reporting groups you defined.

### ART Scale-Up Adults and Children

This bar graph shows the adult and child treatments over the specified date range.

The ART Scale-Up Total graph can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Facility Type.* Selected facility
- *Facility.* Selected supplier and all the facilities it supplies
- *Reporting Group.* A selected reporting group based on the reporting groups you defined.

## Logistics Reports

The logistics reports are described below.

### Adjustments Summary

This report displays adjustment quantities by product and by adjustment type.

The Adjustments Summary report may be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year

- *Product*. Selected product
- *Facility Type*. Selected facility
- *Supplying Facility*. Selected supplier and all the facilities it supplies
- *Reporting Group*. A selected reporting group based on the reporting groups you defined.

### Aggregate Stock Movement by Level

This report displays the aggregated opening balance, receipts, dispensed, adjustments, and closing balance for each product at each distribution level. It calculates the months of stock and the percentage of total available stock that are held at each distribution level. Logistics managers may use this report to monitor the percentage of stock held at different distribution levels in the supply chain.

The Aggregate Stock Movement by Level report can be generated with the following parameters:

- *Period*. Month, quarter, first half, second half, or year
- *Product*. Selected product.

### Couple-Years of Protection

This report displays total couple-years of protection for each facility, grouped by facility type. It calculates couple-years of protection by dividing total consumption by the CYP factor for each product.

The Couple-Years of Protection report can be generated with the following parameters:

- *Period*. Month, quarter, first half, second half, or year
- *Category*. Selected category
- *Product*. Selected product
- *Facility Type*. Selected facility
- *Supplying Facility*. Selected supplier and all the facilities it supplies
- *Reporting Group*. A selected reporting group based on the reporting groups you defined.

### Data Entry Errors

This report lists data that may contain data entry errors. It highlights each error by displaying it in bold italics.

The Data Entry Errors report can be generated with the following parameters:

- *Period*. Months only
- *Period*. A single month, quarter, first half, second half, or year
- *Reporting Group*. A selected reporting group based on the reporting groups you defined.

### Dispensed to Users

This report shows quantities dispensed to users by facility type. It aggregates quantities dispensed by service delivery points (SDPs) and calculates the percentage dispensed by each facility type.

The Dispensed to Users report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Product.* Selected product
- *Facility Type.* Selected facility
- *Supplying Facility.* Selected supplier and all the facilities it supplies
- *Reporting Group.* A selected reporting group based on the reporting groups you defined.

### **Dispensed to Users by Purpose of Use**

This report shows quantities dispensed to users by purpose of use. It sums quantities dispensed by purpose of use for all products and facilities.

The Dispensed to Users by Purpose of Use report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Facility.* Selected supplier and all the facilities it supplies.

### **Distribution Discrepancies**

This report identifies potential discrepancies in reporting by facilities. When the reported issues from a supplying facility do not match the sum of reported receipts by the facilities it supplies, the report flags those records for investigation.

The Distribution Discrepancies report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Facility Type.* Selected facility
- *Facility.* Selected supplier and all the facilities it supplies.

### **Facility Dispensed by Purpose of Use**

This report lists quantities dispensed by purpose of use and total dispensed by each facility. The report can be used to identify discrepancies between aggregated quantities dispensed by purpose of use and total dispensed.

The Facility Dispensed by Purpose of Use report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Facility.* Selected supplier and all the facilities it supplies.

## Stock Imbalances

This report lists facilities that have stock imbalances—out of stock, overstocked, or understocked—according to their reported stock on hand and calculated average monthly consumption. The facilities are grouped according to their supplying facility.

This report can be generated with single reporting periods only.

The Stock Imbalances report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Facility Type.* Selected facility
- *Facility.* Selected supplier and all the facilities it supplies
- *Reporting Group.* A selected reporting group based on the reporting groups you defined.

## Supply Status by Facility

This report displays the supply status of each facility and calculates quantities of products needed to bring a particular facility up to the established maximum level. It contains most of the data submitted by facilities on paper-based reports and a calculation of average monthly consumption.

The Supply Status by Facility report serves two major functions:

- Verifying the integrity of manually entered data
- Evaluating the stock status of a particular facility.

Logistics managers can assess the accuracy of data entry by comparing this report to the original paper-based reports submitted by facilities. If the error rate is higher than 2 percent (more than 2 errors per 100 entries), logistics managers should take action to improve data accuracy.

The Supply Status by Facility report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Facility Type.* Selected facility
- *Facility.* Selected supplier and all the facilities it supplies
- *Reporting Group.* A selected reporting group based on the reporting groups you defined.

## Supply Status by Product

This report displays the supply status of each product at all facilities. Facilities are grouped by their supplying facility.

The Supply Status by Product report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Supplying Facility.* Selected supplier and all the facilities it supplies
- *Reporting Group.* A selected reporting group based on the reporting groups you defined.

### **National TB/Leprosy Program Central Store Order**

This report is used to show the total products needed for the data period.

The National TB/Leprosy Program (NTLP) Central Store Order report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Facility Type.* Selected facility
- *Facility.* Selected supplier and all the facilities it supplies.

### **National TB/Leprosy Program District Report and Request for Drugs**

This report is used for National TB/Leprosy Program (NTLP) to show the stock status and quantity required and allows the warehouse to enter the actual quantity issued for use as a receipt.

The National TB/Leprosy Program District Report and Request for Drugs can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Facility Type.* Selected facility
- *Facility.* Selected supplier and all the facilities it supplies.

### **Program Service Statistics**

This report displays the new and continuing users for the products. The report becomes available when you select the Service Statistics option of the System Configuration form.

The Program Service Statistics report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product

- *Facility Type.* Selected facility
- *Supplying Facility.* Selected supplier and all the facilities it supplies
- *Reporting Group.* A selected reporting group based on the reporting groups you defined.

### **Supply Status by Product, Reporting Group**

This report displays the supply status of each product at all facilities for the specified reporting group.

The Supply Status by Product, Reporting Group report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Facility.* Selected supplier and all the facilities it supplies
- *Reporting Group.* A selected reporting group based on the reporting groups you defined.

### **Total Number of Patients on ART**

This report displays the total patients on ART for each facility. The data show the total over the specified periods.

The Total Number of Patients on ART report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Facility Type.* Selected facility
- *Facility.* Selected supplier and all the facilities it supplies.

### **Consumption Averages by Product**

This report displays the average monthly consumption of the products you procure.

The Consumption Averages by Product report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Facility Type.* Selected facility
- *Facility.* Selected supplier and all the facilities it supplies
- *Reporting Group.* A selected reporting group based on the reporting groups you defined.

### **Output to Excel**

This option (initially designed for Malawi) lets you export the District Aggregated Monthly Worksheet (or the Malawi Picklist) reports to a Microsoft® Excel® spreadsheet. This option will not be available to all users.

The Output to Excel report can be generated with the following parameters:

- *Period*. Month, quarter, first half, second half, or year
- *Category*. Selected category
- *Product*. Selected product
- *Facility Type*. Selected facility
- *Supplying Facility*. Selected supplier and all the facilities it supplies
- *Reporting Group*. A selected reporting group based on the reporting groups you defined.

### **Monthly LMIS Report—District/Zone Summary**

This report, formally called the District Hospital Monthly LMIS (logistics management information system) report, displays a rollup of data for a selected reporting group.

The Monthly LMIS Report—District/Zone Summary report can be generated with the following parameters:

- *Period*. Month, quarter, first half, second half, or year
- *Reporting Group*. A selected reporting group based on the reporting groups you defined

### **Monthly LMIS Report—Facility**

This report, formally called the Health Center Monthly LMIS report, allows you to print a monthly report for one or more facilities.

The Monthly LMIS Report—Facility report can be generated with the following parameters:

- *Period*. Month, quarter, first half, second half, or year
- *Facility Type*. Selected facility
- *Reporting Group*. A selected reporting group based on the reporting groups you defined.

### **Blank District Hospital Monthly LMIS Report**

This report (designed for Malawi) is used to create a worksheet for Malawi users to enter by hand their product-tracking data for district hospitals. This option will not be available to all users.

The Blank District Hospital Monthly LMIS report does not take parameters; however, you can add comments, if needed.

### **Blank Health Center Monthly LMIS Report**

This report (designed for Malawi) is used to create a worksheet for Malawi users to enter by hand their product-tracking data for SDPs. This option will not be available to all users.

The Blank Health Center Monthly LMIS report does not take parameters; however, you can add comments, if needed.



### Requisition for Medical Supplies

This report (designed for Malawi) calculates the required need for products and allows the warehouse to compute updated quantities and product value. This option will not be available to all users.

The Requisition for Medical Supplies report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Supplying Facility.* Selected supplier and all the facilities it supplies
- *Reporting Group.* A selected reporting group based on the reporting groups you defined.

### Summary of Scale-Up of Patients on ART

This report (designed for Uganda) displays the total patients on ART for each facility in each data period (as specified on the report options screen). The maximum number of reporting periods is 12. This option will not be available to all users.

The Summary of Scale-Up of Patients on ART report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Facility Type.* Selected facility
- *Facility.* Selected supplier and all the facilities it supplies.

### Distribution List for Uganda

This report (formerly called the NMS Distribution List) was designed to produce the distribution list for Uganda's warehouses. This option will not be available to all users.

After you select the default parameters on the report options form, you can enter report-specific options as displayed on the Distribution List Options form (Figure 9.3) as follows:

1. In the Central Warehouse field, if more than one supplying warehouse exists, select which central-level warehouse to run the report for.
2. Enter the distribution start date. This date will be displayed on the report as the initial date for deliveries to occur.
3. Enter the distribution end date. This date will be displayed on the report as the last date for deliveries to occur.

Figure 9.3 Distribution List Options form.

The Filter by Reported Date option allows you to include only facilities whose reports were entered between the specified dates to be included on the report. This option was added so that the report can be run on late reporters. The end date in the filter is stored so that the next time the report for this supplier and facility type (as specified on the reports option screen) is run it will be considered the start date.



**Note the dates included are inclusive of the entered values.**

The Distribution List for Uganda report can be generated with the following parameters:

- *Period.* Month, quarter, first half, second half, or year
- *Category.* Selected category
- *Product.* Selected product
- *Facility Type.* Selected facility
- *Facility.* Selected supplier and all the facilities it supplies.

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